

GRANTEE COMMUNITIES PORTAL

Table of Contents

Introduction.....	3
Welcome to the Grantee Communities Portal	4
Registering and managing your account	5
Individuals - Registering for the first time	6
Individual Applicants and Grantees - Managing your account	13
Organizations - Registering for the first time	19
Forgot Password?	26
Managing your bank account	29
Bank Account FAQs	30
Bank Accounts - a primer for non-finance people!	31
Proposals	36
Starting your application.....	37
Adding new contacts	39
Create a role for team members	44
Attaching documents to your proposal record.....	47
I uploaded the wrong document. How do I replace it?	50
Submitting your application	53
Responding to questions on your proposal	57
Managing open grants.....	62
Submitting reports	63
What kind of amendment can I ask for?	66
How do I request a grant amendment or a no-cost extension?	69
Technical Help	74
Issues When Registering	75
Error with Application Attachments	76
First Time Users- Unable to set my password	77

Introduction

Welcome to the Grantee Communities Portal

Thank you for reviewing this information and for using the Grantee Communities Portal. As a reminder, the portal system is the best way for grantees and applicants to interact with Open Society Foundations for any existing grants or potential applications you are submitting.

If this is your first time using our portal system we encourage you to use this website to better understand how to use the Grantee Communities Portal system to update your user data, submit an amendment or grantee report for your current grant, or submit a new application.

As always, if you encounter any issues or questions feel free to reach out to us at granteefeedback@opensocietyfoundations.org.

Registering and managing your account

Individuals - Registering for the first time

If you want to apply for a scholarship or a fellowship, you will have to register on the Grantee Portal with an individual account.

This article outlines the steps to register as an individual grantee.

Click the New User? link

OPEN SOCIETY FOUNDATIONS

English

Username

Password

Sign in

Can't access your account? **New User?**

Welcome to the Open Society Foundations Grant Portal!

For a step by step guide and helpful information on how to use the Grantee Portal, please [click here](#) to review our online support resource.

Once you have reviewed this information you should be ready to register, apply, and monitor your active grants through the Portal. Once you are logged on to the Portal, be sure to look for orange help bubbles for additional information on specific fields.

If you encounter any technical issues or require support with the use of the Portal, please email granteefeedback@opensocietyfoundations.org. We actively monitor this account and will respond on a timely basis.

At the top of the page, be sure to choose Individual

OPEN SOCIETY FOUNDATIONS

Portal Registration / **Step 1** / Step 2 / Step 3

Select One:
☐ Organization ☒ **Individual**

**Enter your first name, last name and a valid email address.
Click Next**

Portal Registration / **Step 1** / Step 2 / Step 3
Organization Individual

First Name

Last Name *

Email *

Confirm Email *

An **Individual** is an applicant who submits grant applications on their own behalf, not representing an academic institution, organization, institution, or government. Individual applicants can only apply for funding opportunities that allow individual people to benefit from OSF funding.

An **Organization** is an entity that submits grant applications on behalf of the group, such as a nonprofit organization, academic institution, or a private business.

Choose your country, then enter the rest of your mailing address. Click Next.

OPEN SOCIETY
FOUNDATIONS

[Portal Registration](#) / [Step 1](#) / **[Step 2](#)** / [Step 3](#)

Mailing Country *

United States

Mailing Street *

111 First Street

Mailing City *

Anytown

Mailing State/Province

Alabama

Mailing Postal Code *

11111

Phone

(313) 123-4567

Next

or go back a step

[Can't access your account?](#) | [Existing User?](#)



When entering your phone number DO NOT use + to indicate country code.

Review and agree to the terms and conditions of using the portal, then choose a username and password. Click Register.

The screenshot shows the 'Portal Registration' process at Step 3. The breadcrumb trail at the top indicates 'Portal Registration / Step 1 / Step 2 / Step 3'. The form contains three main sections: 1. Username: A text input field with 'JanuaryWhite' entered. A red asterisk and a circled '2' are next to the label. 2. Password: A text input field with masked characters. A red asterisk and a circled '3' are next to the label. To the right of the field is a small orange button with a question mark. 3. Confirm Password: A text input field with masked characters. A red asterisk is next to the label. Below these fields is a checkbox that is checked, followed by the label 'Agree Terms And Conditions' with a red asterisk. A circled '1' is next to a blue link labeled 'Terms and Conditions'. At the bottom left is a blue 'Register' button with a red border. To its right is a link that says 'or go back a step'.

Portal Registration / Step 1 / Step 2 / **Step 3**

Username * 2

JanuaryWhite

Password * 3

.....

Confirm Password *

.....

☒ **Agree Terms And Conditions ***

1 [Terms and Conditions](#)

Register or go back a step

After you click register, you will receive an email confirmation.

The screenshot shows a confirmation page for Open Society Foundations. It features the organization's logo at the top left. A yellow banner contains the message 'Thanks! Now waiting on confirmation of your email address.' Below this, the heading 'Request received' is followed by a paragraph: 'Thank you for signing up. Your request may need to be reviewed by our administrative team. You will be notified when your request is processed.' At the bottom, a white box contains the text: 'Questions? Please contact granteefeedback@opensocietyfoundations.org for any support issues.'

**OPEN SOCIETY
FOUNDATIONS**

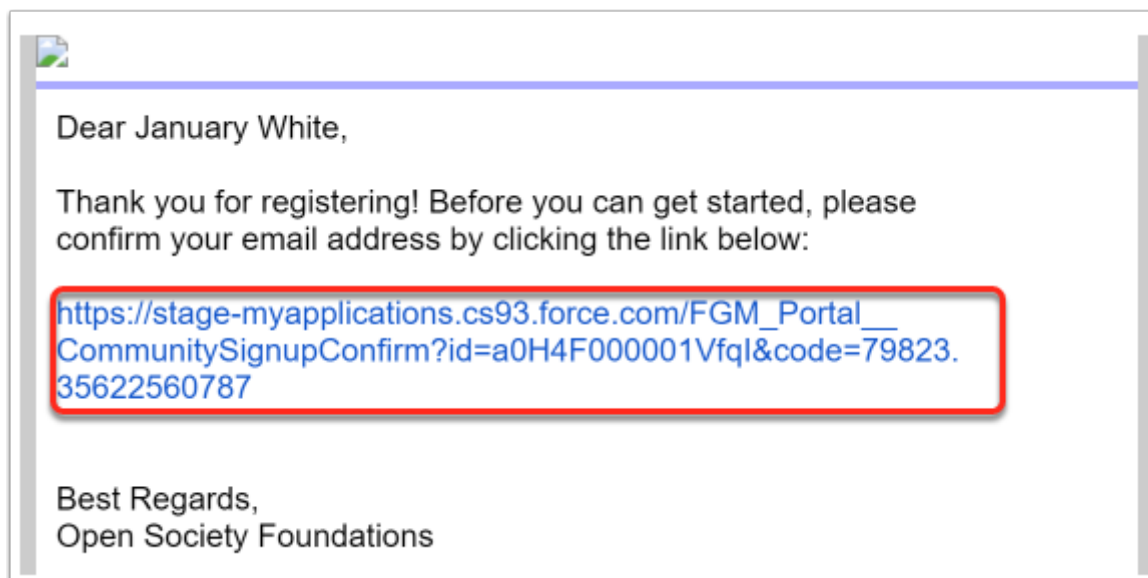
Thanks! Now waiting on confirmation of your email address.

Request received

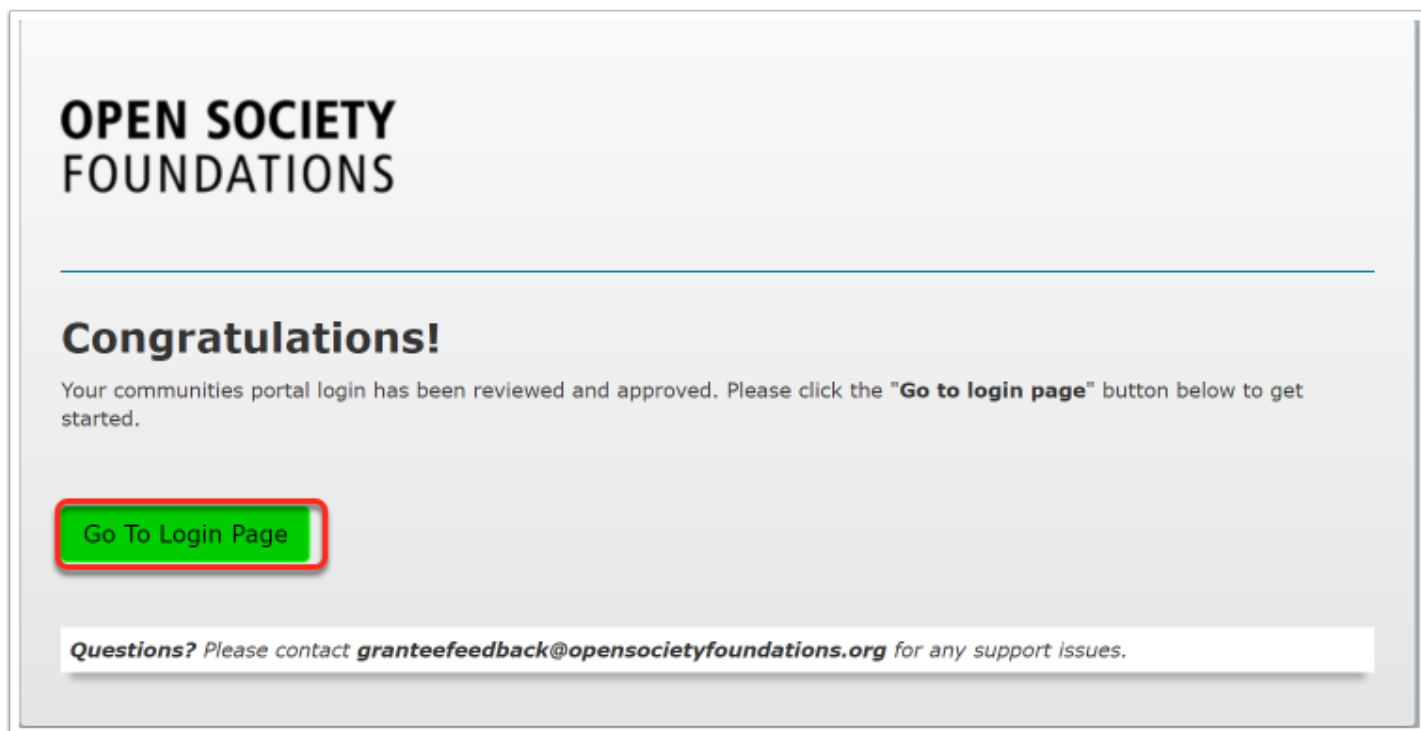
Thank you for signing up. Your request may need to be reviewed by our administrative team. You will be notified when your request is processed.

Questions? Please contact granteefeedback@opensocietyfoundations.org for any support issues.

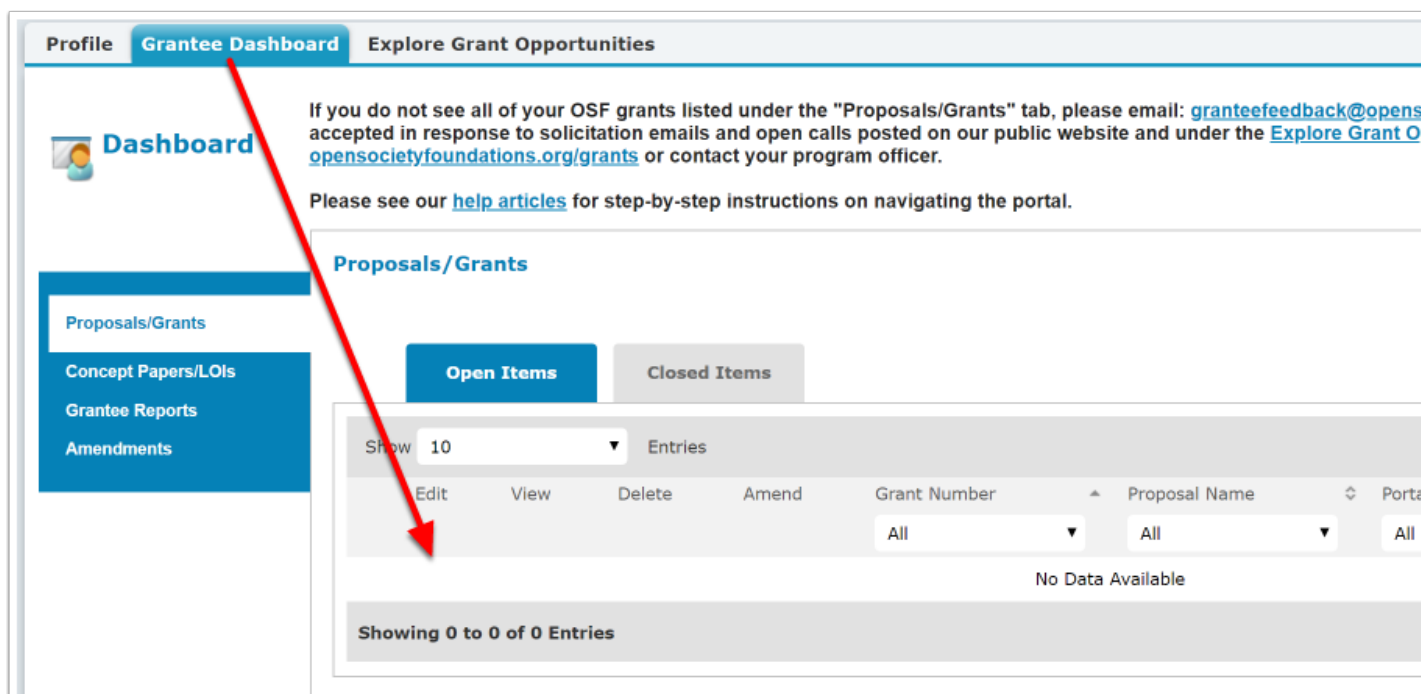
Check your email. You will receive a message to confirm your email address.



The link will re-direct you to the portal. Click Go To Login Page.



You have successfully logged in to the grantee portal. Any applications you have started will appear in the grantee dashboard.



You will receive another email that informs you that your account has been activated. Be sure to keep this message since it contains your username.

💡 When logging in to the portal to update information, be sure to use the highlighted link to access your account.

https://myapplications.force.com/fcgrantee/FGM_Portal_CommunitySignin

Dear January White,

Your portal account has been activated. Please log in at:

https://myapplications.force.com/fcgrantee/FGM_Portal_CommunitySignin

Your username is: **JanuaryWhite**

Please keep this username along with your password in a safe place as you will need these credentials to access your account in the future. Once you've logged in, please complete the profile associated with your account. You can access your profile by clicking the Profile link at the top of the screen. By keeping your profile accurate and up to date, you can ensure we have all the necessary information needed to contact you regarding an application or future grant.

To apply for a new grant, please log in through the application link provided to you by program staff or an open call application link in the "Explore Grant Opportunities" section of the portal. If you need access to any of your current grants and you do not see them in your Grantee Dashboard, please contact granteefeedback@opensocietyfoundations.org.

Best Regards,
Open Society Foundations

Individual Applicants and Grantees - Managing your account

When you create your portal account, some contact information is already included on your profile page.

Individual grant applicants can also add additional information about themselves

- Academic History
- Work/Professional Experience

This article outlines steps to add or update your contact information.

Editing and updating your contact information

Click the Profile tab. Click the Contact tab, then click Edit

The screenshot shows the 'Contact Profile' page in the Grantee Dashboard. The 'Contact' tab is active, and the 'Edit' button is highlighted with a red box and a red arrow pointing to it. The page displays various fields for contact information, including First Name, Middle Name / Initial, Legal First Name, Legal Middle Name, Legal Last Name, Preferred Method of Contact, Mailing Street, Mailing City, Mailing State / Province, Name, Suffix, Gender, Job Title, Department, Confirm Email, Skype ID, Mobile, and Office Phone.

Field	Value
First Name	January
Middle Name / Initial	
Legal First Name	
Legal Middle Name	
Legal Last Name	
Preferred Method of Contact	
Mailing Street	111 First Street
Mailing City	Anytown
Mailing State / Province	Alaska
Name	January White
Suffix	
Gender	
Job Title	
Department	
Confirm Email	testerosf@gmail.com
Skype ID	
Mobile	
Office Phone	

Add or edit information as needed

ContactBank AccountsAcademic HistoryWork Experience

Information

SaveCancel

First Name	January	Name	January White
Middle Name / Initial	F	Suffix	
Legal First Name	January	Gender	Female
Legal Middle Name	F	Job Title	Head Baker
Legal Last Name	White	Department	Bread Section
Preferred Method of Contact	Email	Confirm Email	testerosf@gmail.com

What is a Legal First, Middle and Last Name?

This is the name indicated on legal identification documents. If you are awarded a grant, we need this information in order to process your grant.

My last name has changed. How do I update it?

Unfortunately, you cannot update your last name in the Grantee Portal. Please reach out to your program contact or send a message to granteefeedback@opensocietyfoundations.org and request that an update to your last name.

My address has changed. How do I update it?

Enter updated address information and other contact information

Preferred Method of Contact	Email ▼	Confirm Email	testerosf@gmail.com
Mailing Street	541 First Street 16 of 255 Characters		Skype ID
Mailing City	Anytown		Mobile
Mailing State/Province	Alabama ▼		Office Phone
Mailing Country	United States ▼		Extension
Mailing Zip/Postal Code	11111		Office Fax

Click Save

Save

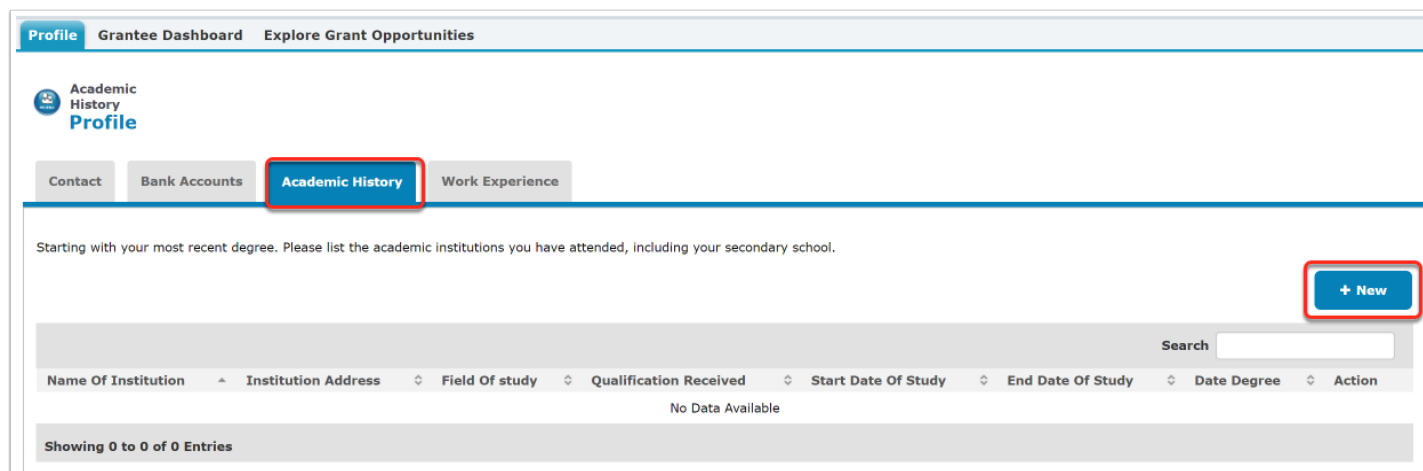
Cancel

Adding and updating academic history

You can update your academic history from the Profile tab.

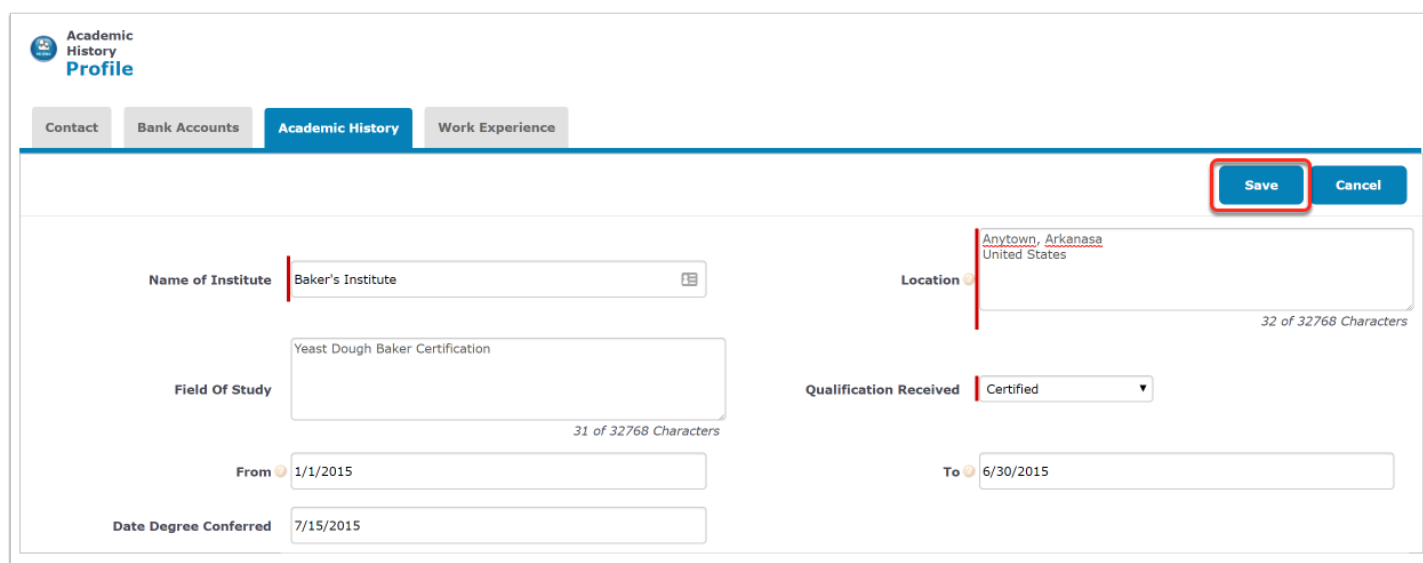
Alternatively, you may be asked for this information within an application. Any academic history information you include on an application will be copied here to your profile record.

From the Profile tab, click Academic History. Click New to create a record



The screenshot shows the 'Academic History Profile' page. At the top, there are tabs: 'Profile', 'Grantee Dashboard', and 'Explore Grant Opportunities'. Below these, the 'Academic History Profile' section is active. It has sub-tabs: 'Contact', 'Bank Accounts', 'Academic History' (highlighted with a red box), and 'Work Experience'. A message states: 'Starting with your most recent degree. Please list the academic institutions you have attended, including your secondary school.' In the top right corner, a '+ New' button is highlighted with a red box. Below the message is a table with columns: 'Name Of Institution', 'Institution Address', 'Field Of study', 'Qualification Received', 'Start Date Of Study', 'End Date Of Study', 'Date Degree', and 'Action'. The table is currently empty, showing 'No Data Available' and 'Showing 0 to 0 of 0 Entries'.

Add required fields. Click Save



The screenshot shows the 'Academic History' form. It has the same sub-tabs as the previous screenshot. The 'Academic History' tab is active. At the top right, 'Save' and 'Cancel' buttons are visible, with 'Save' highlighted by a red box. The form contains the following fields:

- Name of Institute:** A text input field containing 'Baker's Institute'.
- Location:** A text input field containing 'Anytown, Arkansas' and 'United States' on separate lines. A character count '32 of 32768 Characters' is shown at the bottom right.
- Field Of Study:** A text input field containing 'Yeast Dough Baker Certification'. A character count '31 of 32768 Characters' is shown at the bottom right.
- Qualification Received:** A dropdown menu with 'Certified' selected.
- From:** A date input field containing '1/1/2015'.
- To:** A date input field containing '6/30/2015'.
- Date Degree Conferred:** A date input field containing '7/15/2015'.

Review the academic history you entered. Click the Edit link next to the item that you wish to change

Academic History Profile

Contact

Bank Accounts

Academic History

Work Experience

Starting with your most recent degree. Please list the academic institutions you have attended, including your secondary school.

+ New

Name Of Institution	Institution Address	Field Of study	Qualification Received	Start Date Of Study	End Date Of Study	Date Degree	Action
Baker's Institute	Anytown, Arkansas United States	Yeast Dough Baker Certification	Certified	1/1/2015	6/30/2015	7/15/2015	Edit View
Baker's Institute	Anytown, Arkansas United States	AS - Bread and Bagel Degree	Associate Degree	1/1/2016	12/31/2016	2/1/2017	Edit View
Baker's Institute	Anytown, Arkansas United States	BA - Pastry and Desserts	Bachelor Degree	1/1/2017	12/31/2018	5/31/2018	Edit View

Showing 1 to 3 of 3 Entries

Adding Work Experience

Enter your professional experience, starting with your current or most recent job.

Click the Work Experience tab. Click New

Profile

Grantee Dashboard

Explore Grant Opportunities

Work Experience Profile

Contact

Bank Accounts

Academic History

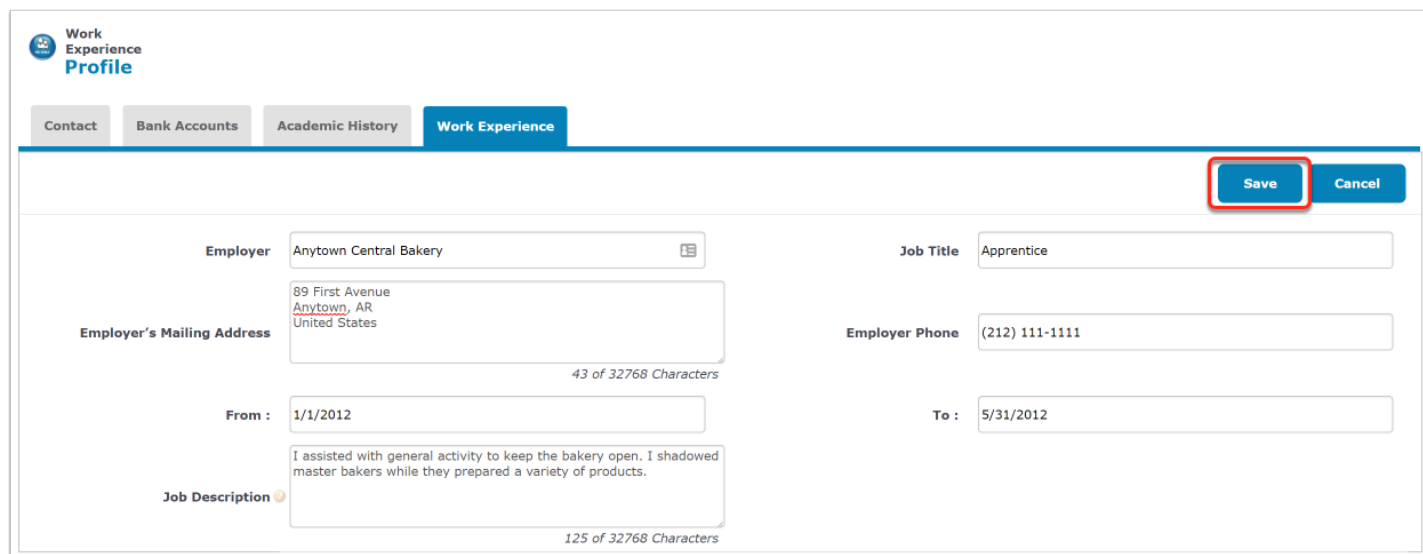
Work Experience

Professional Experience-Starting with your current professional experience first, please list your recent professional experience.

+ New

Place of Employment	Position or Job Title	Employer Address	Employers Phone	Start Date Of Employment	End Date Of Employment	Job Description	Action
---------------------	-----------------------	------------------	-----------------	--------------------------	------------------------	-----------------	--------

Enter your information in the fields. Click Save



Work Experience Profile

[Contact](#)
[Bank Accounts](#)
[Academic History](#)
[Work Experience](#)

Employer Anytown Central Bakery

Job Title Apprentice

Employer's Mailing Address 89 First Avenue
Anytown, AR
United States

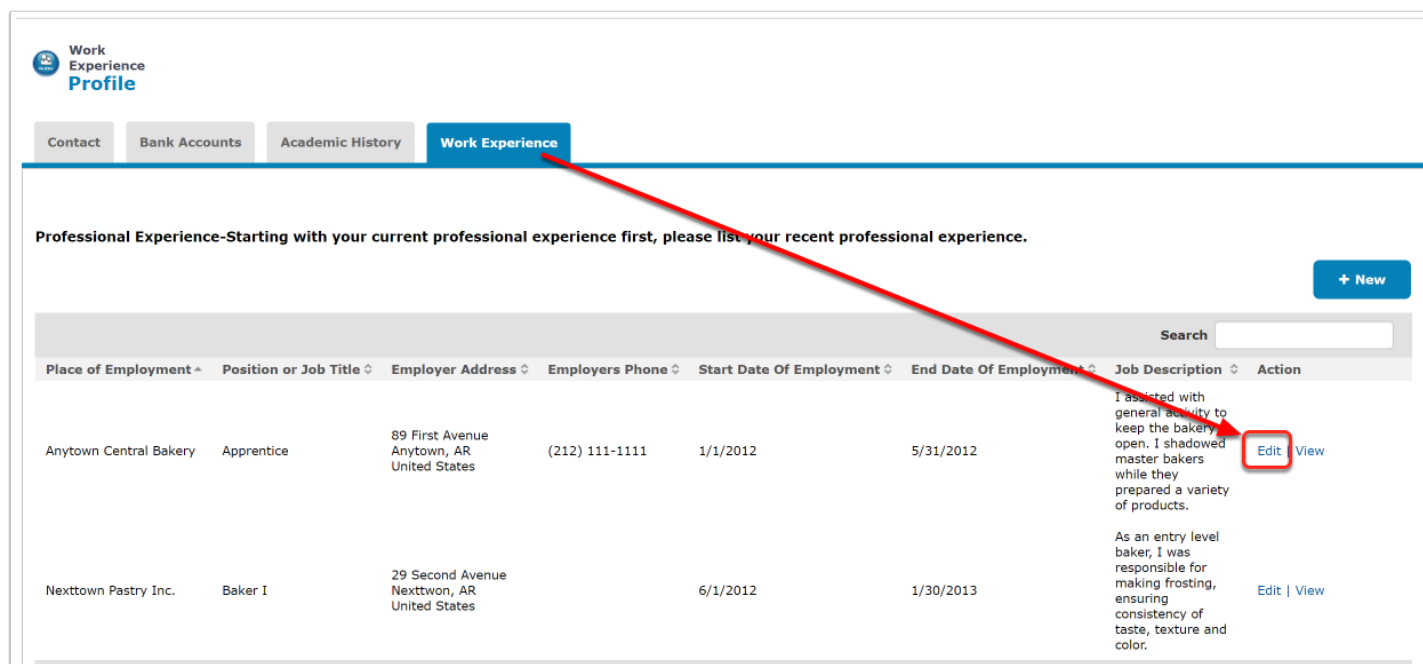
Employer Phone (212) 111-1111

From : 1/1/2012

To : 5/31/2012

Job Description I assisted with general activity to keep the bakery open. I shadowed master bakers while they prepared a variety of products.

Now you can review work experiences you entered. Click the Edit link next to an item you would like to update.



Professional Experience-Starting with your current professional experience first, please list your recent professional experience.

[+ New](#)

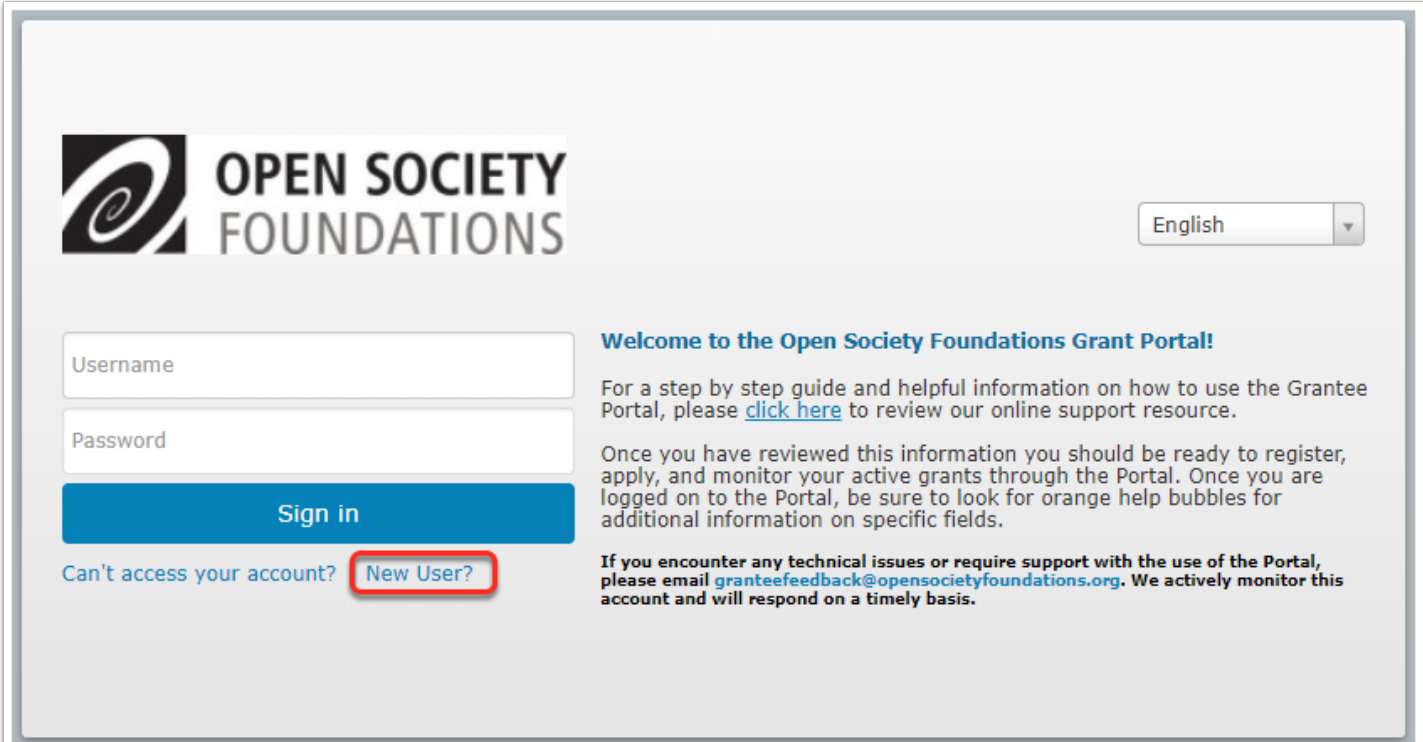
Place of Employment	Position or Job Title	Employer Address	Employers Phone	Start Date Of Employment	End Date Of Employment	Job Description	Action
Anytown Central Bakery	Apprentice	89 First Avenue Anytown, AR United States	(212) 111-1111	1/1/2012	5/31/2012	I assisted with general activity to keep the bakery open. I shadowed master bakers while they prepared a variety of products.	Edit View
Nexttown Pastry Inc.	Baker I	29 Second Avenue Nexttown, AR United States		6/1/2012	1/30/2013	As an entry level baker, I was responsible for making frosting, ensuring consistency of taste, texture and color.	Edit View

Organizations - Registering for the first time

Are you applying for funding on behalf of an organization? Did you receive a link to submit a grant application from an OSF staff member?

If you [haven't](#) registered on the Open Society Foundations Grantee Portal before, follow these steps to complete information about yourself and your organization so that you can submit your funding request.

Click on the New User link on the grant portal page.



OPEN SOCIETY FOUNDATIONS

English ▼

Username

Password

Sign in

[Can't access your account?](#) **New User?**

Welcome to the Open Society Foundations Grant Portal!

For a step by step guide and helpful information on how to use the Grantee Portal, please [click here](#) to review our online support resource.

Once you have reviewed this information you should be ready to register, apply, and monitor your active grants through the Portal. Once you are logged on to the Portal, be sure to look for orange help bubbles for additional information on specific fields.

If you encounter any technical issues or require support with the use of the Portal, please email granteefeedback@opensocietyfoundations.org. We actively monitor this account and will respond on a timely basis.

Select organization. Then complete required fields. Click Next.

Portal Registration / **Step 1** / Step 2 / Step 3

Select One:
☒ Organization ☐ Individual

Organization Legal Name *

Organization ABC

EIN

12-3456789

First Name

Mary

Last Name *

Smith

Email *

testerosf@gmail.com

Confirm Email *

testerosf@gmail.com

Next

An **Organization** is an entity that submits grant applications on behalf of the group, such as a nonprofit organization, academic institution, or a private business.

An **Individual** is an applicant who submits grant applications on their own behalf, not representing an academic institution, organization, institution, or government. Individual applicants can only apply for funding opportunities that allow individual people to benefit from OSF funding.

Please direct any support issues/feedback to granteefeedback@opensocietyfoundations.org. We actively monitor this account and will respond on a timely basis.

[Can't access your account?](#) | [Existing User?](#)

i What is an EIN? The EIN is the Employer Identification Number (or Tax ID) for organizations based in the United States. If your organization is not based in the US, skip this field.

Enter mailing information. Click next.

Portal Registration / Step 1 / **Step 2** / Step 3

Mailing Country *

United States ▼

Mailing Street *

456 Holly Street

Mailing City *

Denver

Mailing State/Province

Colorado ▼

Mailing Postal Code *

80903

Phone

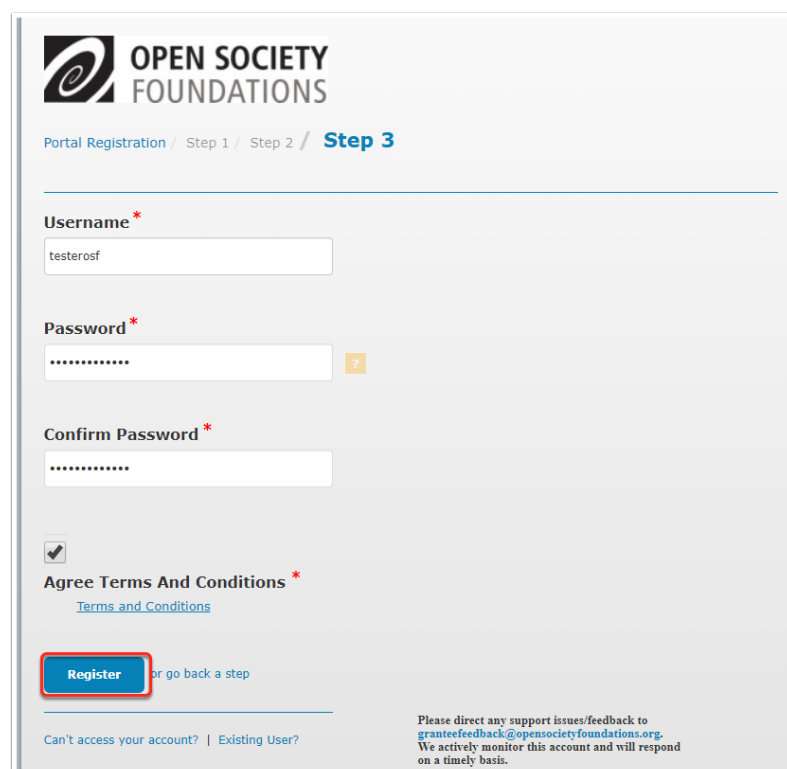
(303) 818-1812

Next or go back a step

[Can't access your account?](#) | [Existing User?](#)

Please direct any support issues/feedback to granteefeedback@opensocietyfoundations.org. We actively monitor this account and will respond

Enter a username, password, and review terms and conditions for using the grantee portal. Click Register.



The screenshot shows the 'Portal Registration' process at Step 3 of the Open Society Foundations. The form includes fields for Username (containing 'testerosf'), Password (masked with dots), and Confirm Password (also masked). There is a checkbox for 'Agree Terms And Conditions' with a link to 'Terms and Conditions'. A red box highlights the 'Register' button, with a link 'or go back a step' next to it. At the bottom, there is a link for 'Can't access your account? | Existing User?' and a footer note about support issues/feedback.

OPEN SOCIETY FOUNDATIONS

Portal Registration / Step 1 / Step 2 / **Step 3**

Username *

testerosf

Password *

.....

Confirm Password *

.....

☒ **Agree Terms And Conditions ***

[Terms and Conditions](#)

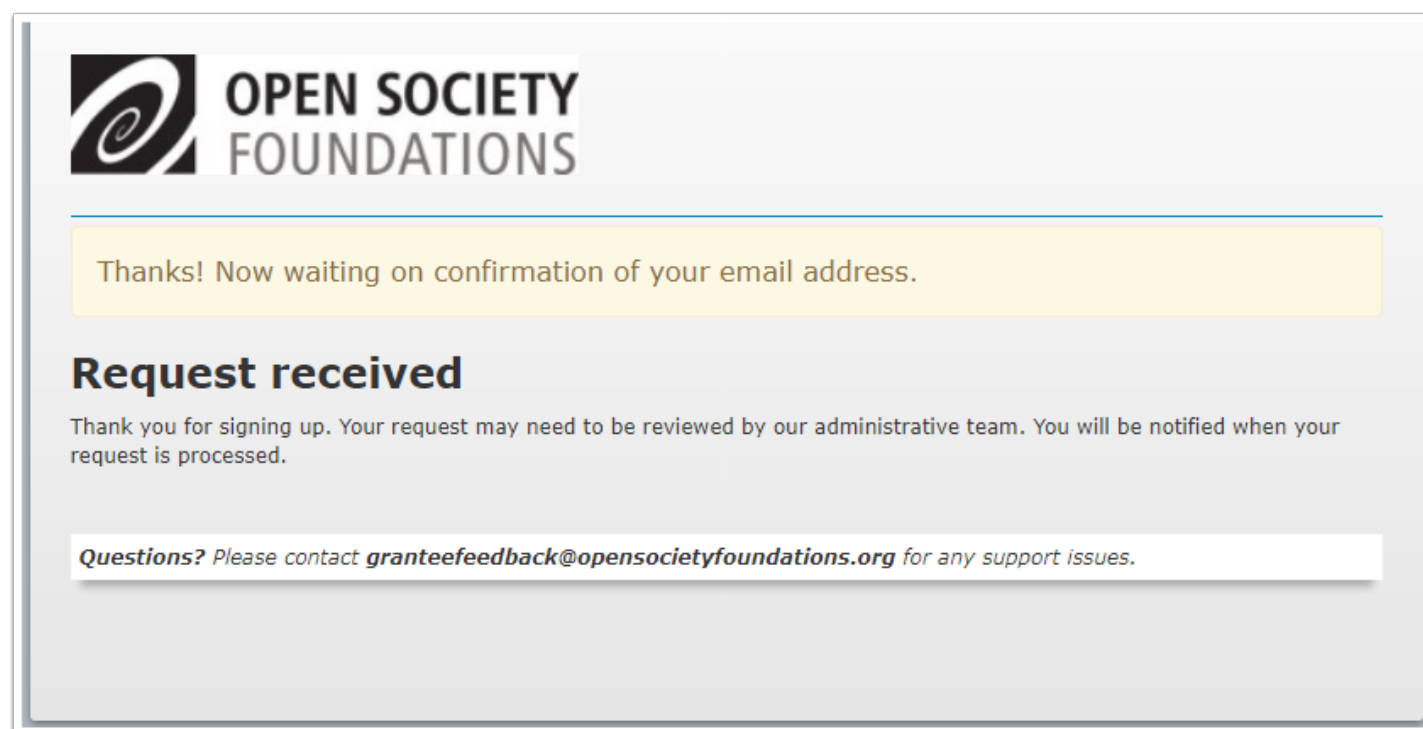
Register or go back a step

[Can't access your account? | Existing User?](#)

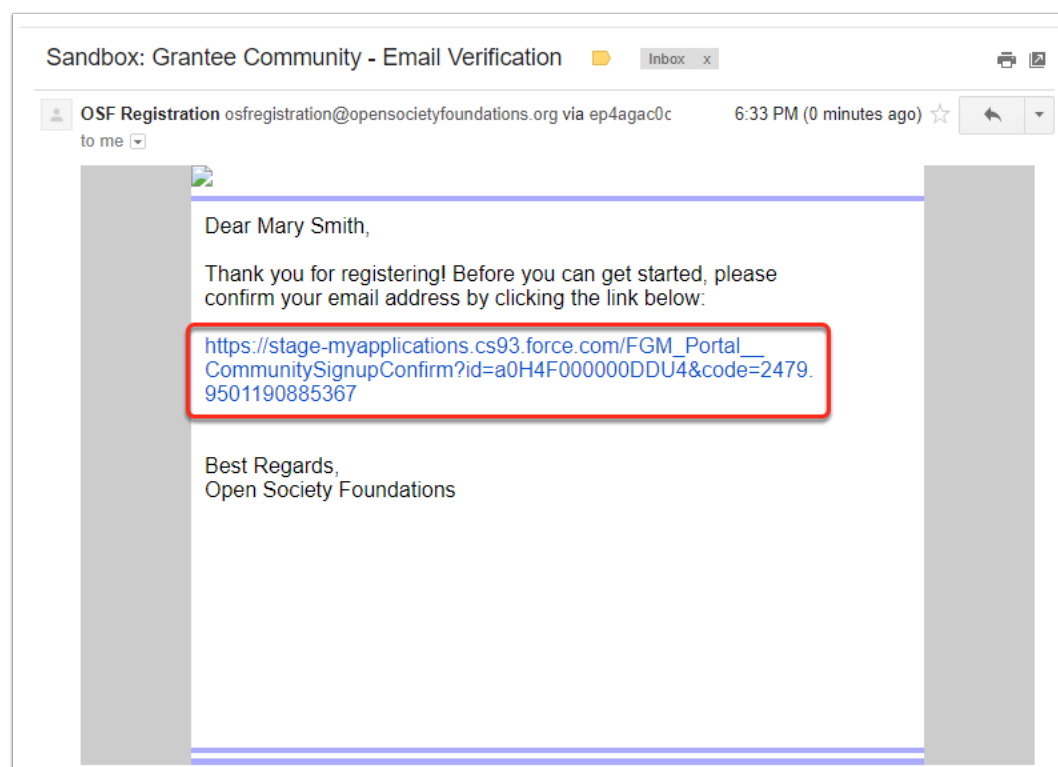
Please direct any support issues/feedback to granteefeedback@opensocietyfoundations.org. We actively monitor this account and will respond on a timely basis.

i The system will generate a username based on the first part of your e-mail address, but you can choose any username that you will remember.

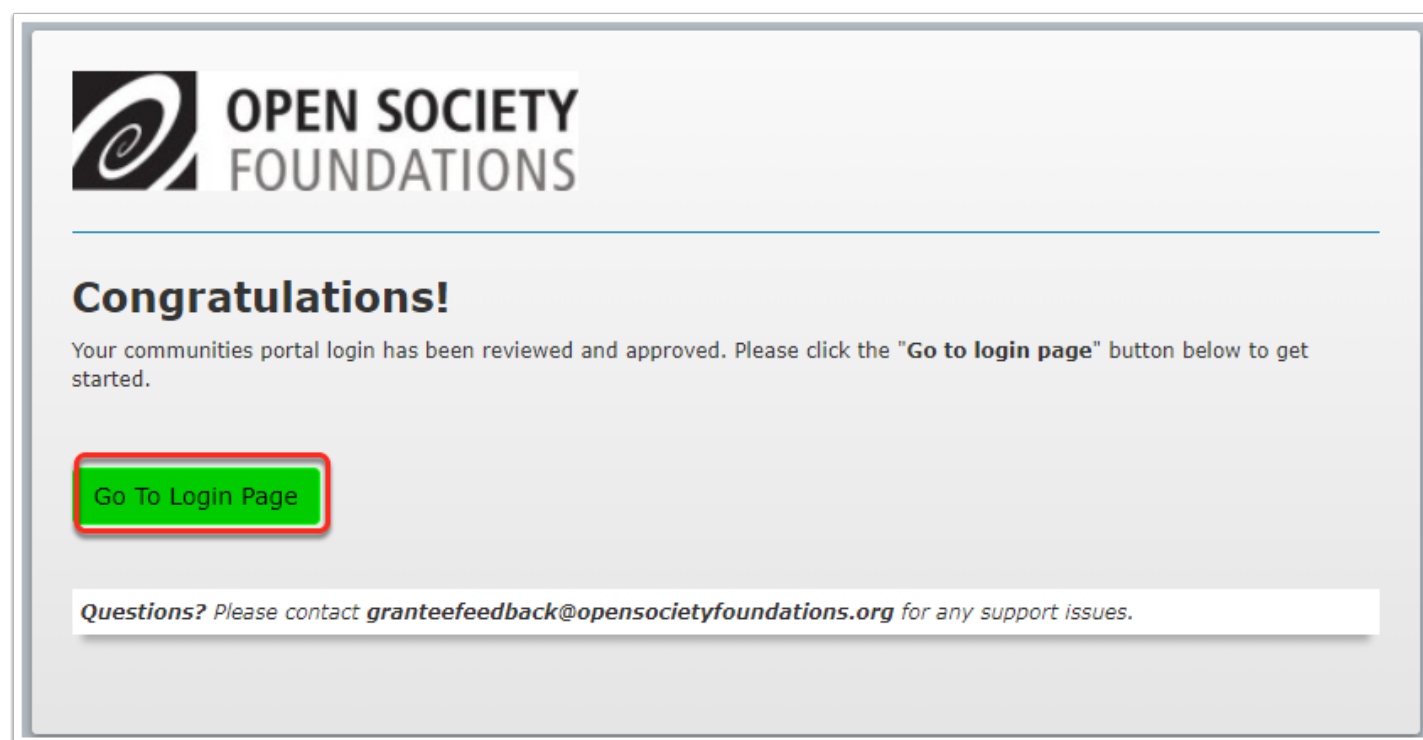
After you submit your registration, look for an email to verify your email address.



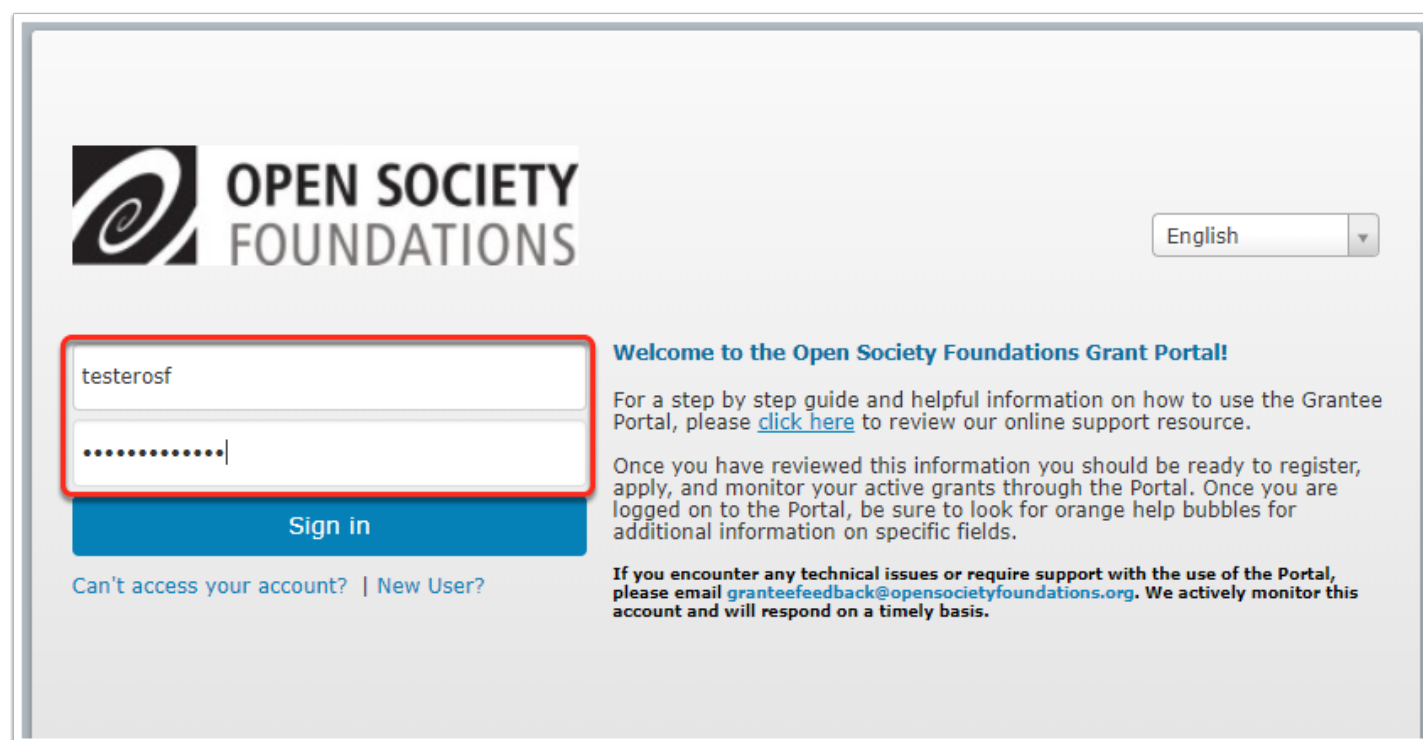
Click on the link in the email to confirm your email address.



The link will take you back to the grant portal. Click the Go To Login Page button to continue.



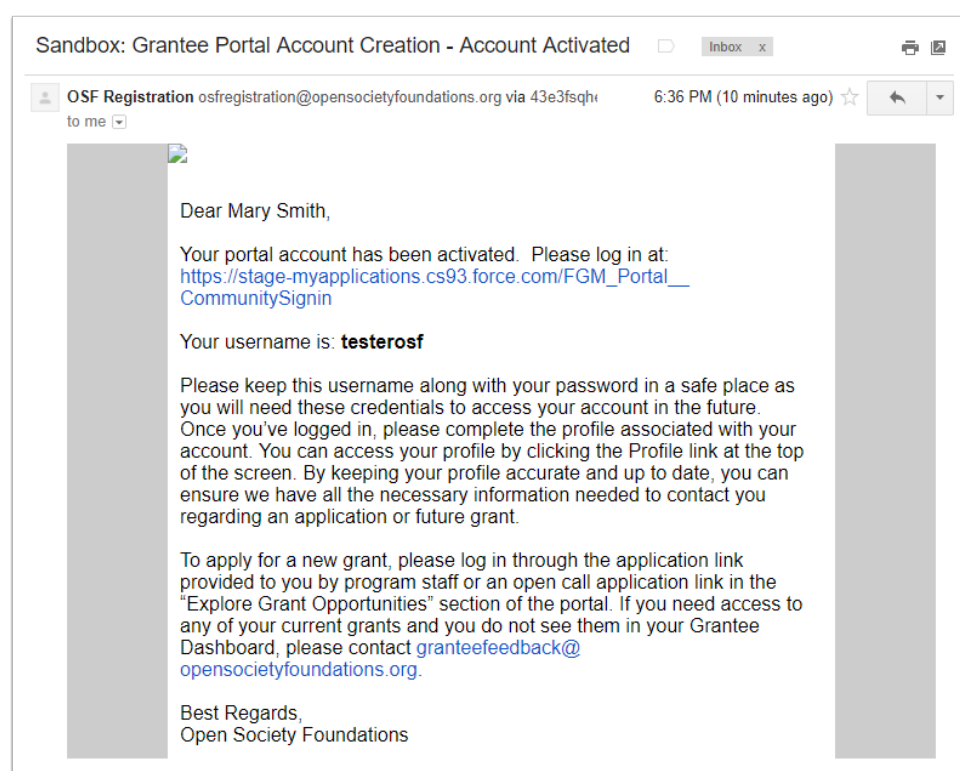
Enter your username and password to sign in.



You will receive another email notifying you that your account has been activated.

 Be sure to keep this message since it has your username.

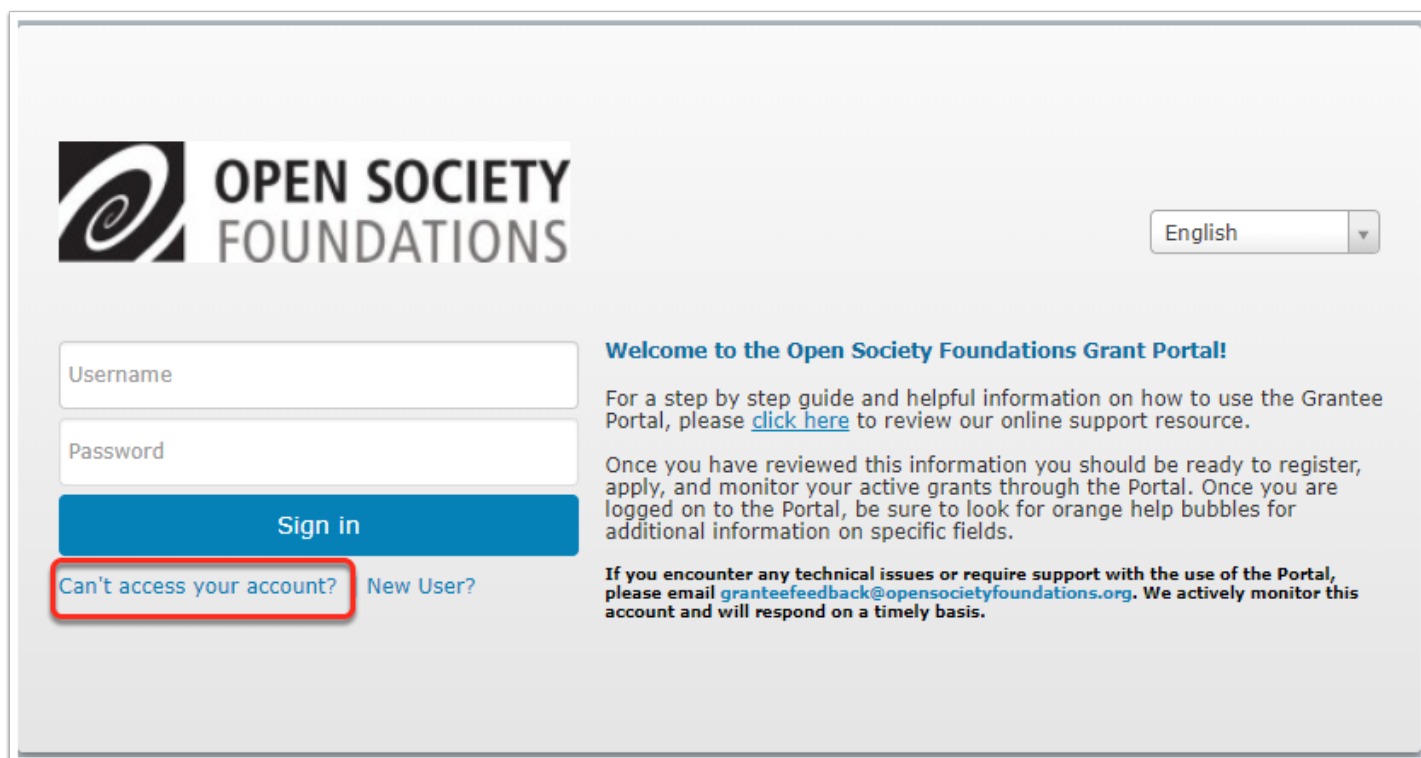
 Follow the link in the message to manage pending applications and open grants.



Forgot Password?

Did you forget your password? Follow these steps to re-set your password to log in to the Open Society Foundations Grant Portal.

Click the "Can't access your account?" link.



OPEN SOCIETY FOUNDATIONS

English

Username

Password

Sign in

[Can't access your account?](#) [New User?](#)

Welcome to the Open Society Foundations Grant Portal!

For a step by step guide and helpful information on how to use the Grantee Portal, please [click here](#) to review our online support resource.

Once you have reviewed this information you should be ready to register, apply, and monitor your active grants through the Portal. Once you are logged on to the Portal, be sure to look for orange help bubbles for additional information on specific fields.

If you encounter any technical issues or require support with the use of the Portal, please email granteefeedback@opensocietyfoundations.org. We actively monitor this account and will respond on a timely basis.

Enter your user name. Click continue.



Having trouble logging in?

- Verify you're entering the correct user name.
- Passwords are case sensitive, so ensure you don't have caps lock enabled.
- Your account may be temporarily disabled from too many failed login attempts.

If you still can't log in, enter your user name to reset your password.

Continue

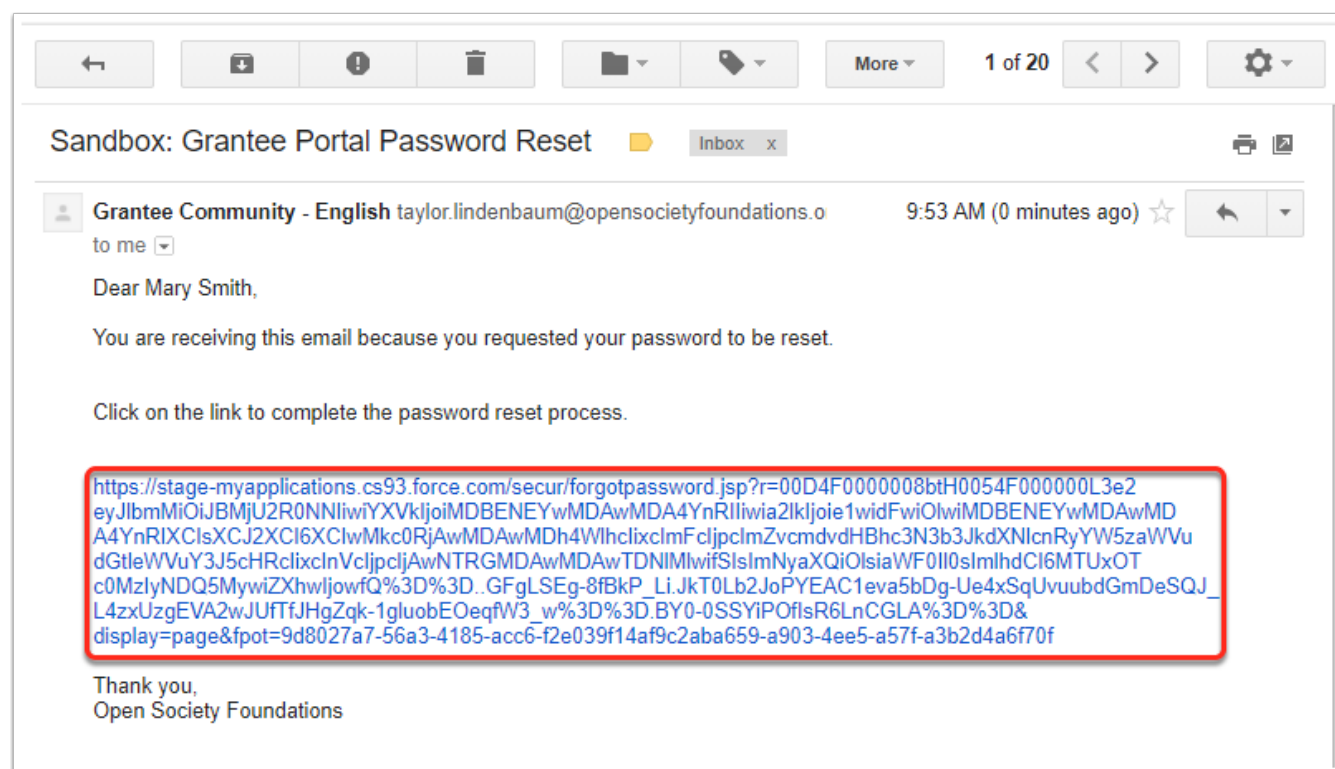
Please direct any support issues/feedback to granteefeedback@opensocietyfoundations.org. We actively monitor this account and will respond on timely basis.



Now, check your email

Check the email account associated with your user name for instructions on resetting your password. Remember to look in your spam folder, where automated messages sometimes filter. If you still can't log in, contact your administrator.

Click the link in your email to re-set your password.



Choose your new password. Click change password.

The screenshot shows the Salesforce "Change Your Password" interface. At the top is the Salesforce logo. Below it, the heading "Change Your Password" is displayed. The form prompts the user to "Enter a new password for testerosf@stage-myapplications.cs93.force.com. Your password must have at least:" followed by three requirements: "8 characters", "1 letter", and "1 number", each with a green checkmark icon. There are two input fields: "New Password" and "Confirm New Password". The "New Password" field has a "Good" status indicator, and the "Confirm New Password" field has a "Match" status indicator. A blue "Change Password" button is located below the input fields. At the bottom, a note states: "Password was last changed on 2/27/2018 2:54 PM."

Managing your bank account

Bank Account FAQs

You can enter your banking details in the Open Society Foundations Grant Portal so that if you are awarded a grant, we can make payment.

Complete required fields. Also, be sure to mark the bank account valid.

Organization

Contact

Bank Accounts

Save

Cancel

Bank Account Name

Bank account is valid ☒

Bank Name

Chase Bank

Account Number

123456

IBAN Number

Sort Code

Transit Code

Country

United States

Street Address

669 Main Street

15 of 255 Characters

City/Town

Denver

Bank State/Province

CO

Postal Code

80404

Account Holder Name

Organization 123

ABA number

02100021

SWIFT/BIC Number

CHASEUS33

Branch

Comments

0 of 255 Characters

Bank to Bank Information

0 of 300 Characters

Corresponding Bank Name

0 of 300 Characters

Corresponding Bank Account Number

Corresponding Bank SWIFT Code

Corresponding Address

0 of 300 Characters

Bank Accounts - a primer for non-finance people!

What information is required by Open Society Foundations in order to transfer a grant payment?

This article summarizes frequently asked questions about banking information that we need in order to send funds for awarded grant applications.

When creating a bank account record, be sure to enter required fields and mark the "Bank account is valid" box. Save.

Organization Contact **Bank Accounts**

Save Cancel

Bank Account Name

Bank account is valid ☒

Bank Name Chase Bank

Account Holder Name Organization 123

Account Number 123456

ABA number 02100021

IBAN Number

SWIFT/BIC Number CHASEUS33

Sort Code

Branch

Transit Code

Comments 0 of 255 Characters

Country United States

Bank to Bank Information 0 of 300 Characters

Street Address 669 Main Street 15 of 255 Characters

Corresponding Bank Name 0 of 300 Characters

City/Town Denver

Corresponding Bank Account Number

Bank State/Province CO

Corresponding Bank SWIFT Code

Postal Code 80404

Corresponding Address 0 of 300 Characters

Account Holder Name

When entering the account holder name, please do not use special characters or non A-Z or 0-9 characters. Please replace letters with diacritical marks like these: À, Á, Â, Ã, Ä, Å, Æ, Æ, Ç, Ð, Ø with letters without the mark or accent.

This field integrates into our banking file, and causes a delay in payment if special characters are used.

Do you see fields that don't look familiar? Here are definitions for some of the information we might ask for on your bank account in order to make payment.

What are ABA and SWIFT codes?

ABA and SWIFT codes convey what bank a wire should be sent to.

An ABA number (also known as routing number or routing transfer number) is a sequence of nine numeric characters used by banks to identify specific financial institutions within the United States.

Swift Code is a standard format of Bank Identifier Codes (BIC) and it is unique identification code for a particular bank. These codes are used when transferring money between banks, particularly for international wire transfers. Banks also used the codes for exchanging other messages between them.

What does an ABA look like? Is it the same as the routing number?

Banks located in the United States use ABA or routing codes. An ABA code is 9 digits, all numbers.

Examples:

Bank of America (wires to all branches)= **026009593**

JP Morgan Chase (New York branch)= **021000021**

JPMorgan Chase (California branch)= **322271627**

As you can infer from the examples, some banks have a universal ABA for all branches, while other banks may use different ABA's for different branches. Therefore, don't be surprised if two wires to the same bank may have two different ABA numbers.

What does a SWIFT code look like? Is it the same as a BIC number?

SWIFT codes are 8 or 11 digits usually have the following format:

BBBBCCkk

OR

BBBBCCkkXXX

Where

C= The Country Code (Examples: GB for the United Kingdom, DE for Germany, FR for France)

k= The “check” code, two digits or letters (there is an algorithm for how to determine the check code, but it’s so mind-numbingly esoteric it’s not worth going into here)

B= The Bank Information Code (or “BIC”). It is usually a 4-letter abbreviation of the bank (Examples: BARC for Barclays, LOYD for Lloyds, CITI for Citibank).

Do note that sometimes the four letters don’t look at the bank at all (For example: MIDL for HSBC bank, which is due to the fact that Midland Bank was bought out by HSBC, but they never bothered to change the BIC)

X= The Branch code (optional). This is a 3-digit combination of numbers and/or letters, or simply “XXX” if it’s the main branch. If the SWIFT code is only 8 digits and the branch code is left of, we in finance know that “XXX” is implied.

An example of some SWIFT codes:

BARCGB22XXX (This is going to Barclays in the United Kingdom, main branch)

BARCGB22 (essentially the same as the one above it)

BARCGB2103B (This is also going to Barclays in the United Kingdom, but specifies a branch)

See <http://www.theswiftcodes.com/> to confirm SWIFT Code.

What if I only have a SWIFT code for a US Bank?

If your bank has only provided you with SWIFT information such as:

CHASUS33 (JP Morgan Chase)

CITIUS33 (Citibank)

Our finance department is often able to use this information to look up the ABA number, but if no ABA is available, a SWIFT can be used.

What if my US Bank (or Credit Union) doesn't have a SWIFT code?

If your bank or credit union does NOT have a SWIFT or BIC code, then use the following in the field:

CREDITUNION

What does an account number look like?

The format varies from bank to bank, but is usually 6-26 digits, mostly numbers but on rare occasions use letters.

What is an IBAN?

An IBAN stands for International Bank Account Number, and is a coding system meant to supplant account codes for international wires. IBAN codes provide more detailed information than normal account numbers and usually have less risk in transcription errors.

Is an IBAN required for all wires?

For wires to **US banks** (from other US banks, which is the case with US), IBANs are not used.

For wires to **European banks** and some other banks, the IBAN is required. Follow these external links to see where IBAN is mandatory and recommended.

- [Countries where the use of IBAN is mandatory](#)
- [Countries where the use of IBAN is recommended](#)

What does an IBAN look like?

The format of an IBAN number varies by country, and a complete list can be found here:

http://en.wikipedia.org/wiki/IBAN#List_of_valid_IBANs_by_country

Don't be overwhelmed by this list; you need not memorize every format of IBAN. The important takeaway is understanding roughly what it looks like so you can find it on the mess of numbers your vendor, consultant, or grantee gives you from their bank: an IBAN number is usually a 15-31 digit mixture of numbers or letters, with the first two letters being a country code.

Some generic examples to get a feel for what they look like:

GB22 BARC 1234 5612 3456 78 (United Kingdom)

FR12 1234 5123 4512 3456 7890 012 (France)

RO80 BRDE 123S V123 4567 8901 (Romania)

What is a SORT code?

Banks in the UK require one additional piece of information for a wire to go through: a 6 digit code called a Sort Code.

In theory, a bank should be able to determine the Sort Code from the IBAN number: it is digits 9-14 of the IBAN. So if the IBAN is **GB22 BARC 1234 5612 3456 78**, the Sort code will be **12-34-56**.

In practice, the banks are never that proactive, and are known to reject wires for missing a Sort Code even though they have the IBAN. For this reason it is best practice to be redundant and include the Sort Code as a separate line.

What is a Transit Number?

A Transit Number is used while doing financial transactions with Canadian Banks. The 8 digit Transit Number identifies the beneficiary financial institution and the branch to which a payment is being initiated. A Transit Number is essential for making payments through the Canadian clearing system.

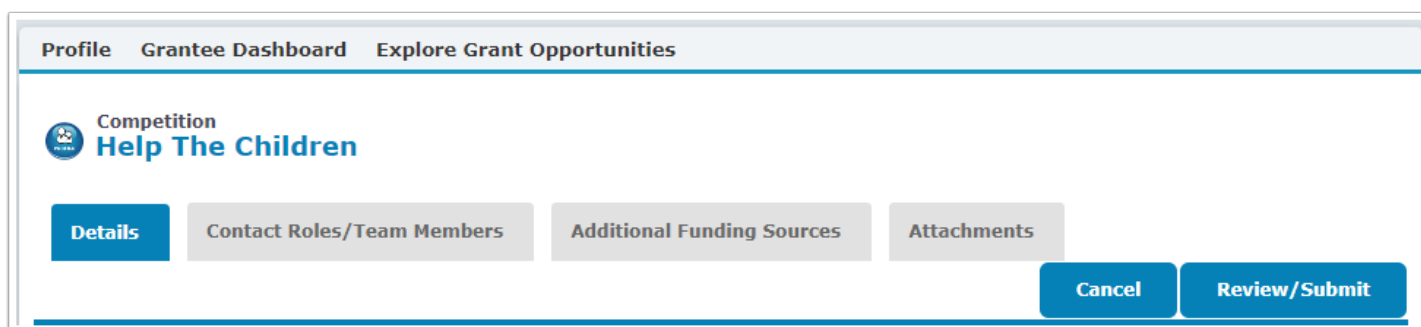
Proposals

Starting your application

This article walks you through the steps of starting your application for funding at OSF.

You can apply for grants either by applying to one of the grant opportunities listed on the Explore Grant Opportunities page OR by following a special link sent by an OSF staff person.

Clicking the link will open the application form.



The screenshot shows the OSF application interface. At the top, there are navigation tabs: 'Profile', 'Grantee Dashboard', and 'Explore Grant Opportunities'. Below the tabs, the competition name 'Help The Children' is displayed with a logo. Underneath, there are four buttons: 'Details' (highlighted in blue), 'Contact Roles/Team Members', 'Additional Funding Sources', and 'Attachments'. At the bottom right, there are two buttons: 'Cancel' and 'Review/Submit'.

Complete all fields. Click Save.

 If you don't have all your application materials gathered and ready to submit, complete the required fields and save your work.

Please complete the Application below. Please click "Save" to save your work or "Save and Next" to save and proceed to the next page of this Application.

Request Information

Proposal Name *

General Support 2018-2020

Start Date *

4/1/2018

End Date *

3/31/2020

Requested Amount in USD *

What is the total requested amount in USD?

250000

Current organization Budget in USD

Please list the amount of your organization's current fiscal year budget in USD.

1500000

Fiscal Year Start Date

When does your fiscal year start?

4/1/2018

Fiscal Year End Date

When does your fiscal year end?

3/31/2019

Project Budget in USD

Please list your total project budget in USD.

1

Project Budget Start Date

When does your project budget start?

Project Budget End Date

When does your project budget end?

Previous/Current OSF Grant Recipient

☒ No

☐ Yes

After you click save, you'll see the application on the proposals/grants tab of your dashboard. The proposal will stay in "In Progress" status until you submit it for review.

Profile **Grantee Dashboard** Explore Grant Opportunities

Dashboard

If you do not see all of your OSF grants listed under the "Proposals/Grants" tab, please email: granteefeedback@opensocietyfoundations.org. New proposals are only accepted in response to solicitation emails and open calls posted on our public website and under the [Explore Grant Opportunities](#) tab. Please review opensocietyfoundations.org/grants or contact your program officer.

Proposals/Grants

Open Items **Closed Items**

Show 10 Entries Search

▲	Edit	View	Delete	Amend	Grant Number	Proposal Name	Portal Status	Start Date
					All	All	All	All
					OR2018-39748	General Support 2018-2020	In Progress	4/1/2018

Showing 1 to 1 of 1 Entries Previous 1 Next

Adding new contacts

Do you need to invite someone to collaborate with you on this grant application?

Follow these steps to send that person an invitation to access this grant application.

On the application record, click the Contact Roles/Team Member tab. Click the Invite New Members button.

The screenshot shows the 'Contact Roles/Team Members' tab selected in the application record interface. The interface includes a navigation bar with 'Profile', 'Grantee Dashboard', and 'Explore Grant Opportunities'. Below the navigation bar, the 'Contact Roles/Team Members' tab is highlighted, with a red box around it and a red arrow pointing to the '+ Invite New Members' button. The interface also features a 'Cancel' button and a 'Review/Submit' button. A search bar is visible at the bottom right.

Profile Grantee Dashboard Explore Grant Opportunities

Competition
Help The Children

Details **Contact Roles/Team Members** Additional Funding Sources Attachments

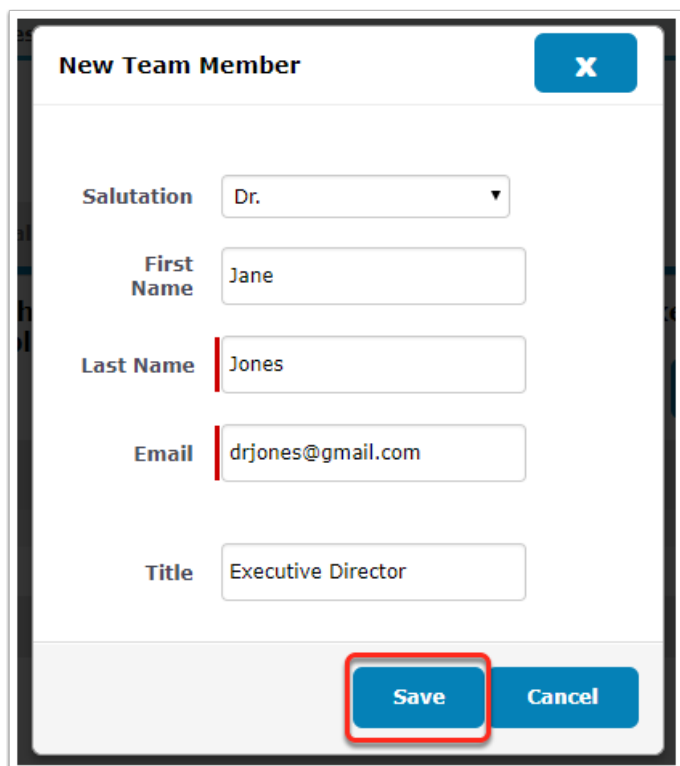
Cancel Review/Submit

Please indicate those members of your team that will be involved in the development or execution of this Application. If your team members do not already exist in the system, please create them by adding new contacts.

+ Invite New Members + Search/Add Members

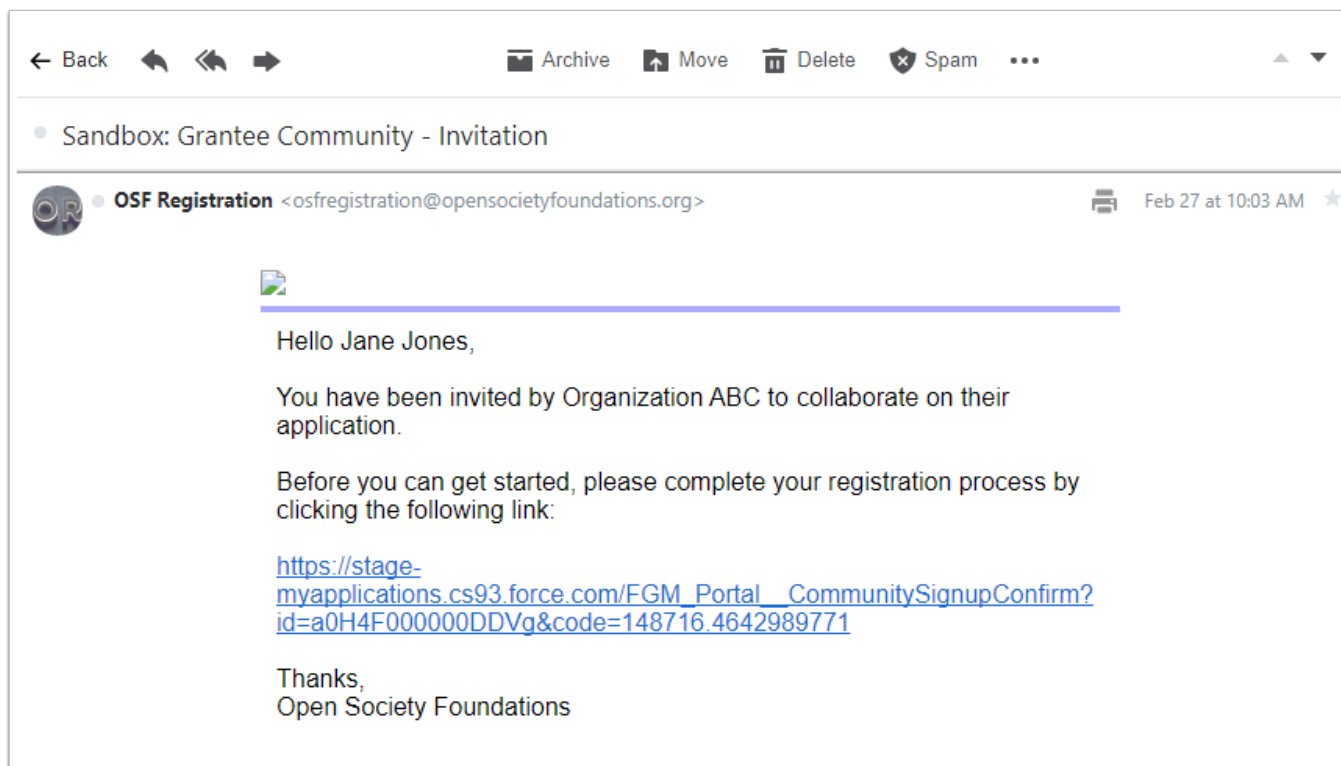
Search

**Enter the name and email address for the new team member.
Click Save.**



The image shows a web form titled "New Team Member" with a close button (X) in the top right corner. The form contains five input fields: "Salutation" (a dropdown menu with "Dr." selected), "First Name" (containing "Jane"), "Last Name" (containing "Jones"), "Email" (containing "drjones@gmail.com"), and "Title" (containing "Executive Director"). At the bottom of the form, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red rectangular border.

The new team member will receive an invitation message to register for the Grantee Portal.



They will choose a username and password to register.



**OPEN SOCIETY
FOUNDATIONS**

Username

Password

Confirm Password

Register

Questions? Please contact granteefeedback@opensocietyfoundations.org for any support issues.

A message will be sent to the team member after our administrative team has reviewed the request. Please allow 2 business days to receive notification.



Request received

Thank you for signing up. Your request may need to be reviewed by our administrative team. You will be notified when your request is processed.

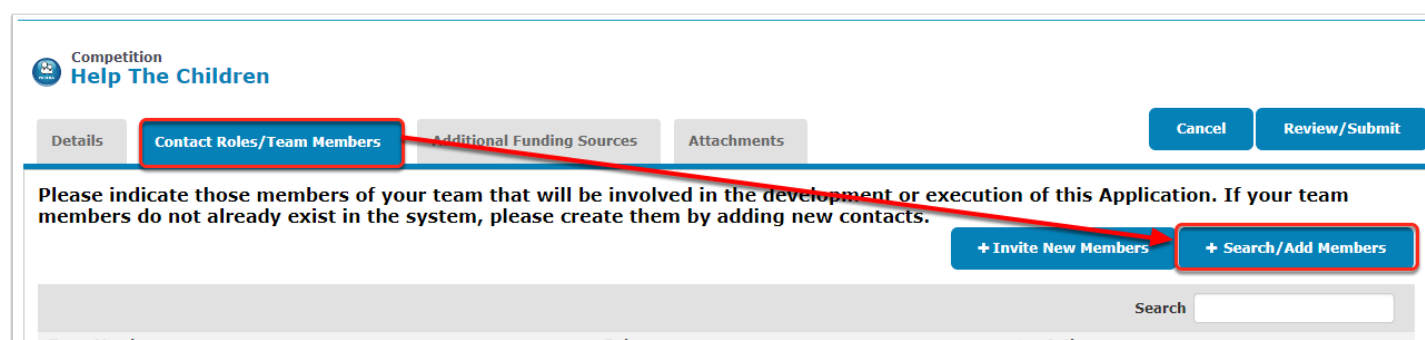
Questions? Please contact granteefeedback@opensocietyfoundations.org for any support issues.

Create a role for team members

Do you want to designate who should sign a grant agreement? Or who should be contacted about grantee reports and payments?

This article outlines the steps to designate those roles on an application.

On the Contact Roles/Team Members tab, click Search/Add members



Competition
Help The Children

Details **Contact Roles/Team Members** Additional Funding Sources Attachments

Cancel Review/Submit

Please indicate those members of your team that will be involved in the development or execution of this Application. If your team members do not already exist in the system, please create them by adding new contacts.

+ Invite New Members **+ Search/Add Members**

Search

**Select a user, then choose one or more roles that user has.
Click Save.**

Competition
Help The Children

Details Contact Roles/Team Members Additional Funding Sources Attachments Cancel Review/Submit

1. Select a User.
2. Roles will be displayed. Choose one or more roles for the selected user.

Select a User

Mary Smith

Role

Portal Access

Proposal Access

Choose one or more Roles

Executive Director
Board Member
Fiscal Agent Signatory
Fiscal Agent Contact
Consultant

Primary Application Contact
Authorized Signatory

Save Cancel

What does each role mean?

Role Name	What it means?
Primary Application Contact *	The main contact person for the grant. This is usually the person with substantive knowledge of the grant activities.
Reporting Contact	This person will receive email notification of report due dates.
Payment Contact	This person will receive email notification of grant payment.
Executive Director	The head or leader of the organization.
Board Member	A member of the organization's governing board. Please list only if the board member is involved with developing the proposal.

Role Name	What it means?
Authorized Signatory *	This person is authorized to sign a grant agreement on behalf of the organization.
Fiscal Agent Authorized Signatory	This person is authorized to sign a grant agreement on behalf of a fiscal agent operating to facilitate grant fund transfer.
Fiscal Agent Contact	This is a contact at the fiscal agent.
Consultant	Someone who might contribute to the development of a grant application.
Other	



A Primary Application Contact and an Authorized Signatory are required to complete a grant agreement.

You can view each person with their assigned roles.

Competition
Help The Children

Details

Contact Roles/Team Members

Additional Funding Sources

Attachments

CancelReview/Submit

Please indicate those members of your team that will be involved in the development or execution of this Application. If your team members do not already exist in the system, please create them by adding new contacts.

+ Invite New Members

+ Search/Add Members

Search

Team Member	Roles	Action
Mary Smith	Portal Access; Primary Application Contact; Authorized Signatory	Edit View

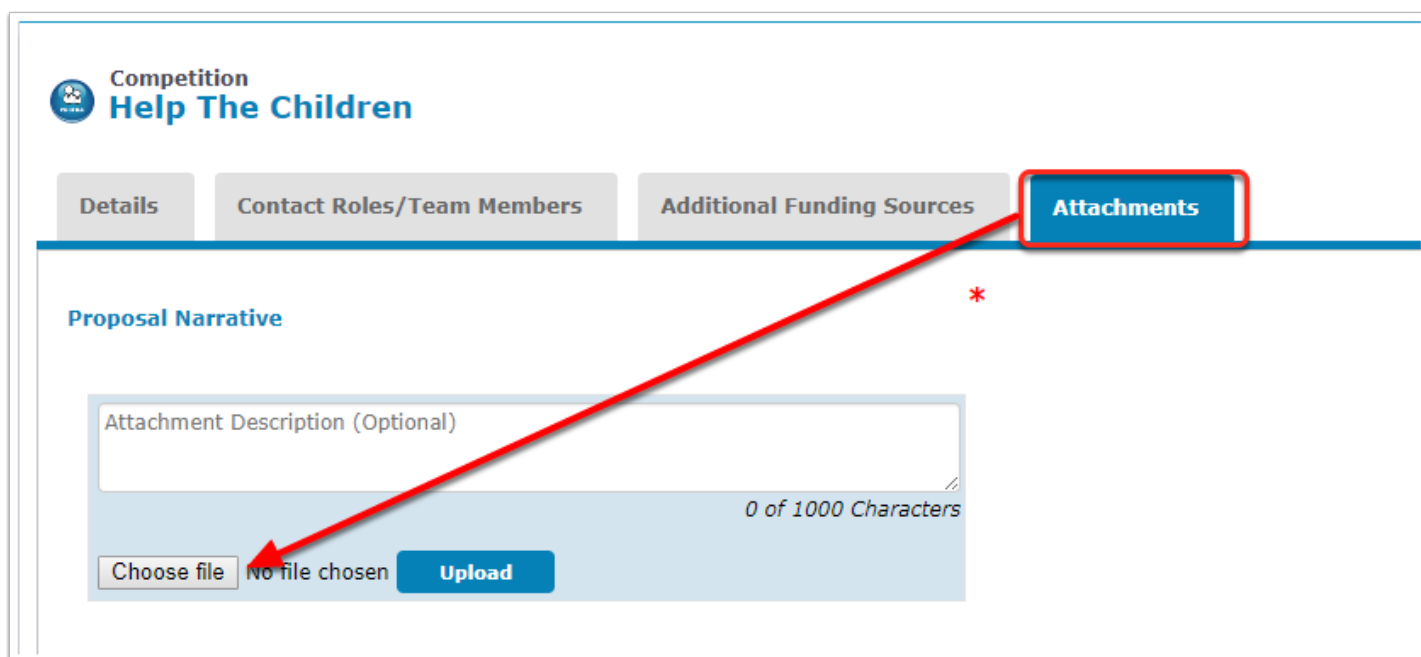
Showing 1 to 1 of 1 Entries

Attaching documents to your proposal record

Once you are ready to upload proposal and budget documents to your grant application, follow these steps.

⚠ If you are using the Internet Explorer browser, you may have trouble uploading attachments to your grant application. Please use Chrome, Firefox, or Safari browsers to complete your application.

In the proposal record, click on the attachments tab. Click Choose file.



The screenshot displays the 'Competition Help The Children' interface. At the top, there are four tabs: 'Details', 'Contact Roles/Team Members', 'Additional Funding Sources', and 'Attachments'. The 'Attachments' tab is highlighted with a red box. Below the tabs, the 'Proposal Narrative' section is visible. It contains a text area for 'Attachment Description (Optional)' with a character count of '0 of 1000 Characters'. Below the text area, there is a 'Choose file' button, the text 'No file chosen', and an 'Upload' button. A red arrow points from the 'Attachments' tab to the 'Choose file' button.

Attach the file from your computer. You can add a brief description of the file if you wish. Click upload.

Proposal Narrative *

General Support Proposal

24 of 1000 Characters

Choose file

Proposal.docx

Upload

You will receive a message that the file upload was successful.

i

File Upload Successful

Proposal Narrative *

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	<u>Proposal Narrative-Proposal.docx</u>	General Support Proposal	02/27/2018	Delete

Attachment Description (Optional)

0 of 1000 Characters

Choose file

No file chosen

Upload

 If you need to upload more than one file (like multiple writing samples, or proposal appendices) in order to respond to a question, complete the first two steps again.

Proposal Narrative

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	OR2018-46692-Proposal Narrative-Proposal Template.docx	Sample #3	10/19/18	Delete
2	OR2018-46692-Proposal Narrative-Review Document.docx	Sample #2	10/19/18	Delete
3	OR2018-46692-Proposal Narrative-Proposal Template.docx	Sample #1	10/19/18	Delete

Attachment Description (Optional)

0 of 1000 Characters

Choose file

Upload

No file chosen

Upload the other required files (those with a red asterisk). Click Save to attach the files to your application.

Save

Clear Changes

I uploaded the wrong document. How do I replace it?

As long as you haven't submitted your application, you can still make changes and replace documents that you have uploaded through the portal.

From your dashboard, navigate to your pending application. Click on the edit button next to the application you need to update.

! Applications in the following statuses cannot be edited:

- Submitted
- Awarded
- Closed

Profile Grantee Dashboard Explore Grant Opportunities

If you do not see all of your OSF grants listed under the "Proposals/Grants" tab, please email: granteefeedback@opensocietyfoundations.org

Dashboard Opportunities New proposals are only accepted in response to solicitation emails and open calls posted on our public website and under the Opportunities tab. Please review opensocietyfoundations.org/grants or contact your program officer.

Please see our [help articles](#) for step-by-step instructions on navigating the portal.

Proposals/Grants

Open Items Closed Items

Show 10 Entries Search

Edit	View	Delete	Amend	Grant Number	Proposal Name	Portal Status
				All	All	All
				OR2018-46692	Document Upload Regression	In Progress
				OR2017-35463	Regression test for May 2017	Application Started
				OR2017-37089	Test for July FC Training	Submitted

What happens if I get an error message?

Unfortunately, you can't submit the application because the deadline has passed. Please reach out to the program if you need to submit the application after the deadline.

Clicking cancel will allow you to view the application record.

This proposal can no longer be edited because it has already been submitted or the application deadline has passed. Please reach out to granteefeedback@opensocietyfoundations.org for assistance or click Go To Dashboard to close this window.

[Cancel](#)[Go To Dashboard](#)

Click the Attachments tab.

[Profile](#) [Grantee Dashboard](#) [Explore Grant Opportunities](#)



Competition

SD Regression Communities GO LIVE

[Details](#)[Contact Roles/Team Members](#)[Additional Funding Sources](#)[Attachments](#)

Please complete the Application below. Please click "Save" to save your work or "Save and Next" to save and proceed to the next page of this Application.

Find the document that you want to delete or replace. Click Delete.

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	OR2018-46692-Proposal Narrative-Proposal Template.docx	Sample #3	10/19/18	Delete
2	OR2018-46692-Proposal Narrative-Review Document.docx	Sample #2	10/19/18	Delete
3	OR2018-46692-Proposal Narrative-Proposal Template.docx	Sample #1	10/19/18	Delete

Confirm that you want to delete the attachment.

myapplications.force.com says

Are you sure you want to delete this record?

OK

Cancel

The document has been removed.

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	OR2018-46692-Proposal Narrative-Review Document.docx	Sample #2	10/19/18	Delete
2	OR2018-46692-Proposal Narrative-Proposal Template.docx	Sample #1	10/19/18	Delete

Attachment Description (Optional)

0 of 1000 Characters

Choose file

Upload

No file chosen

You can follow these steps to upload a new version if you desire. [Attaching documents to your proposal record](#)

Click Save.

Save

Clear Changes

Submitting your application

After you have answered the required questions on each tab and attached the required documents, you may submit your application for review.

This article outlines the steps to review and submit your application.

From the grantee dashboard, navigate to the proposals/grants tab. Click on the edit button to open the application you have started.

The screenshot shows the 'Grantee Dashboard' with tabs for 'Profile', 'Grantee Dashboard', and 'Explore Grant Opportunities'. The 'Grantee Dashboard' tab is active. On the left, a sidebar contains links: 'Proposals/Grants' (highlighted with a red box), 'Concept Papers/LOIs', 'Grantee Reports', and 'Amendments'. A red arrow points from the 'Proposals/Grants' link to the 'Edit' button (pencil icon) in the table row for grant OR2018-39748. The table has columns: Grant Number, Proposal Name, Portal Status, and Start Date. The row for OR2018-39748 shows 'General Support 2018-2020' and 'Application Started' on 4/1/2018. Below the table, it says 'Showing 1 to 1 of 1 Entries'.

After you have entered information on each tab, click the Review/Submit button.

The screenshot shows the 'Competition Help The Children' application form. The 'Details' tab is active. At the bottom right, the 'Review/Submit' button is highlighted with a red box. Below the form, a message reads: 'Please complete the Application below. Please click "Save" to'.

Review the information you have entered for the entire proposal. If the information you entered is correct, click submit.

[Profile](#) [Grantee Dashboard](#) [Explore Grant Opportunities](#)

 **Review/Submit**
General Support 2018-2020

[Back to Record](#) [Print](#) [Submit](#)

Details

Proposal Name	General Support 2018-2020
Start Date	4/1/2018
End Date	3/31/2020
Requested Amount In USD	USD 250,000.00
Is Bank Account Holder Different From Applicant	☐
Current organization Budget In USD	USD 1,500,000.00
Fiscal Year Start Date	4/1/2018
Fiscal Year End Date	3/31/2019
Project Budget In USD	
Project Budget Start Date	
Project Budget End Date	
Previous/ Current OSF Grant Recipient	☐

Contact Roles/Team Members

Please indicate those members of your team that will be involved in the development or execution of this Application. If your team members do not already exist in the system, please create them by adding new contacts.

Search

Team Member	Roles
Mary Smith	Portal Access; Primary Application Contact; Authorized Signatory

Showing 1 to 1 of 1 Entries

Pending Invited Team members

Search

First Name	Last Name	Email	Status	Role
Jane	Jones	dawnpage25@yahoo.com	Approved	Portal Access

Showing 1 to 1 of 1 Entries

Attachments

Proposal Narrative

Sr. Number	File Name	Attachment Description (Optional)	Created Date
1	Proposal Narrative-Proposal.docx	General Support Proposal	02/27/2018

Proposal Budget

Sr. Number	File Name	Attachment Description (Optional)	Created Date
1	Proposal Budget-032017 Rockstar.xlsx		02/27/2018

Organization Budget

No Attachments

Financial Statements

Sr. Number	File Name	Attachment Description (Optional)	Created Date
1	Financial Statements-2018-02-26723-42-43,000+0000.		02/27/2018

Annual Report

No Attachments

IRS Tax Returns

No Attachments

Key Staff resumes/Cvs

No Attachments

List Of Board Members

No Attachments

Tax Determination Letter

No Attachments

[Back to Record](#)
[Print](#)
[Submit](#)

Once you submit, you won't be able to edit the application.

Are you sure you want to Submit? You will not be able to edit this form once it is submitted.

[Cancel](#)
[OK](#)

The status of the application is changed to "Submitted." OSF Program Staff will review your application and notify you if they have questions or you need to take additional action.

[Proposals/Grants](#)
[Concept Papers/LOIs](#)
[Grantee Reports](#)
[Amendments](#)

Proposals/Grants

Open Items

Closed Items

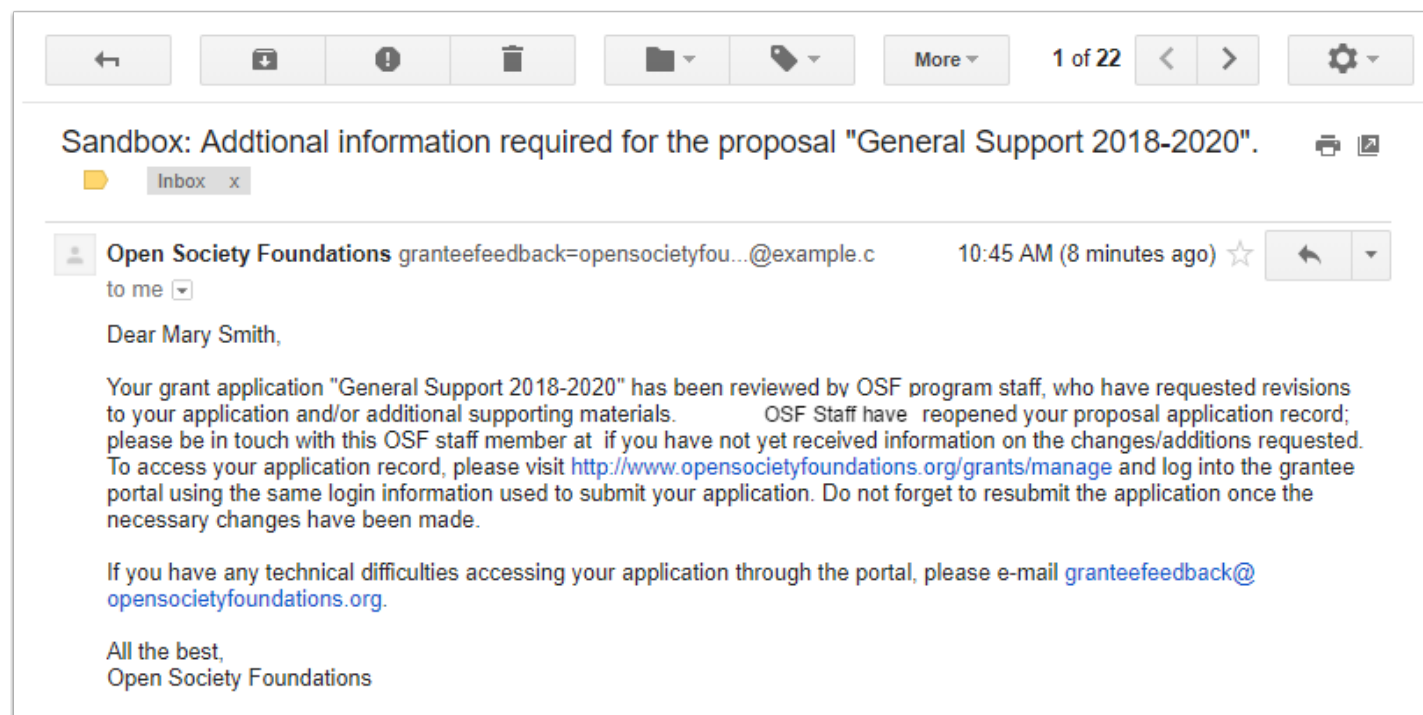
Show	10	Entries	Search
Edit View Delete Amend	Grant Number All	Proposal Name All	Portal Status All
Q	OR2018-39748	General Support 2018-2020	Submitted
Showing 1 to 1 of 1 Entries			Previous 1

Responding to questions on your proposal

If you have submitted a proposal, and OSF Program staff have follow-up questions, you will be able to submit an updated proposal and budget that responds to their questions.

This article outlines the steps you should take.

Optimally, you will receive a personalized email from program staff with their specific questions first. Then you may receive the following system-generated message.



When you navigate to the Grantee Dashboard, you will see that the Edit icon is available. The status of the proposal has been updated to "Application Re-Opened."

 **Dashboard**

If you do not see all of your OSF grants listed under the "Proposals/Grants" tab, please email: granteefeedback@opensocietyfou proposals are only accepted in response to solicitation emails and open calls posted on our public website and under the [Explor](#) Please review opensocietyfoundations.org/grants or contact your program officer.

Please see our [job aids](#) for step-by-step instructions on navigating the portal.

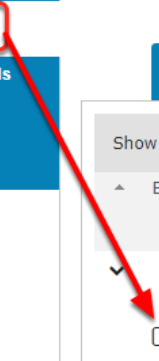
Proposals/Grants

Open Items **Closed Items**

Show 10 Entries Search

Edit	View	Delete	Amend	Grant Number	Proposal Name	Portal Status
✓	🔍	🗑️		OR2016-28150	Consolidation of Democracia Abierta	Awarded
✎	🔍			OR2018-39723	Help the Children Today	Application Re-Opened

Showing 1 to 2 of 2 Entries



Click on the attachments tab.

-  Most of the time, OSF program staff will ask for clarifications on grant activities or a grant budget. To update that information, you should revise your original grant application document and address the points that the program staff has raised.

 Competition
Help The Children

Details

Contact Roles/Team Members

Additional Funding Sources

Attachments

Please complete the Application below. Please click "Save" to save your work or "Save and Next" to save and proceed to the next page of this Application.

Request Information

To upload the revised proposal narrative, chose a file from your computer and upload it.

 If you are attaching a revised document, it is helpful to add a brief description.

Competition Help The Children

Details

Contact Roles/Team Members

Additional Funding Sources

Attachments

Proposal Narrative *

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	OR2018-39723-Proposal Narrative-FC Library.docx		02/13/2018	Delete

2 Updated version of proposal attached.

37 of 1000 Characters

1 Choose file

Proposal.docx

3 Upload

The new file has been uploaded.

Details
Contact Roles/Team Members
Additional Funding Sources
Attachments

i File Upload Successful

Proposal Narrative *

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	<u>OR2018-39723-Proposal Narrative-FC Library.docx</u>		02/13/2018	Delete
2	<u>Proposal Narrative-Proposal.docx</u>	Updated version of proposal attached.	03/01/2018	Delete

Attachment Description (Optional)

0 of 1000 Characters

Choose file
No file chosen
Upload

Click Save.

Tax Determination Letter
Please attach a copy of your IRS Tax determination letter.

Attachment Description (Optional)

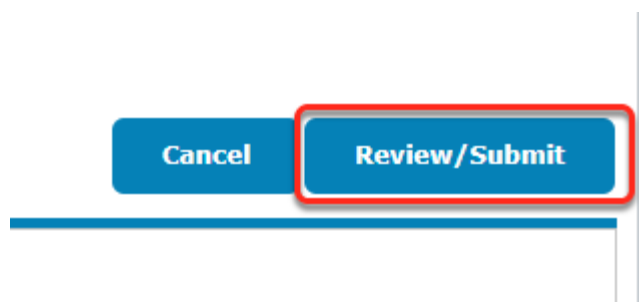
0 of 1000 Characters

Choose file
No file chosen
Upload

Save

Clear Changes

Then click on the Review/Submit button.



You have another chance to review the new attachments that will be submitted for review.

Proposal Narrative

Sr. Number	File Name	Attachment Description (Optional)	Created Date
1	OR2018-39723-Proposal Narrative-FC Library.docx		02/13/2018
2	Proposal Narrative-Proposal.docx	Updated version of proposal attached.	03/01/2018

Click Submit.

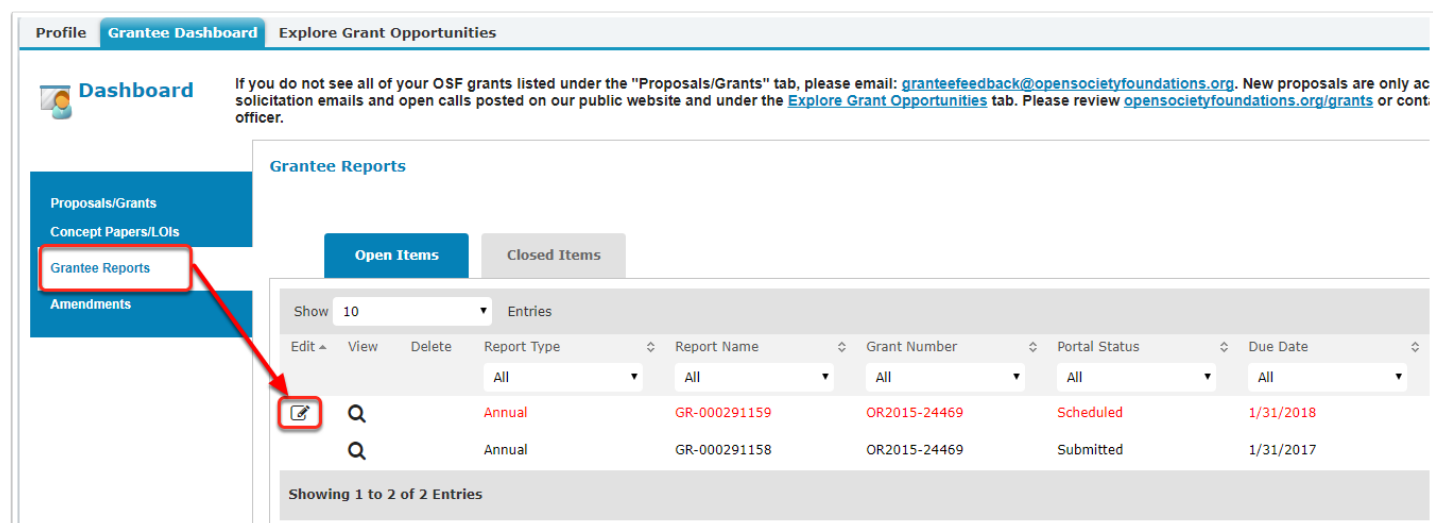


Managing open grants

Submitting reports

If you have an active grant, you can submit grantee reports in the Grantee Portal. This article outlines the steps to submit pending reports.

**Click the Grantee Reports tab to review open grantee reports.
Click the Edit button to attach reports.**



Profile **Grantee Dashboard** Explore Grant Opportunities

Dashboard

If you do not see all of your OSF grants listed under the "Proposals/Grants" tab, please email: granteefeedback@opensocietyfoundations.org. New proposals are only accepted via solicitation emails and open calls posted on our public website and under the [Explore Grant Opportunities](#) tab. Please review opensocietyfoundations.org/grants or contact your grant officer.

Grantee Reports

Open Items **Closed Items**

Show 10 Entries

Edit	View	Delete	Report Type	Report Name	Grant Number	Portal Status	Due Date
			All	All	All	All	All
			Annual	GR-000291159	OR2015-24469	Scheduled	1/31/2018
			Annual	GR-000291158	OR2015-24469	Submitted	1/31/2017

Showing 1 to 2 of 2 Entries

Choose the file from your computer, add a description and upload your report.


Annual
GR-000291159

Attachments

Details

Please upload your Annual in the space below. Be sure to click "Upload" after you have selected your file. Y
Click "Save & Next" to continue.

Please upload the Annual Report

2

2017 Annual Report

1

Choose file

Portal text updates.docx

3

Upload

Save

Save & Next

Clear Changes

You will receive a message that the file upload was successful. Click Save and Next to add comments.

Profile
Grantee Dashboard
Explore Grant Opportunities

Narrative Final
GR-000308414

Attachments
Details

Cancel
Review/Submit

Please upload your Narrative Final in the space below. Be sure to click "Upload" after you have selected your file. You can add any comments or notes on the next tab of the report. Click "Save & Next" to continue.

Please upload your Final Narrative report *

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	GR-000308414-Narrative Final-ER Report Grantee Community - English.pdf		03/01/2018	Delete

Attachment Description (Optional)
0 of 1000 Characters

Choose file
No file chosen
Upload

Save
Save & Next
Clear Changes

Click the Review/Submit button.

Cancel
Review/Submit

What kind of amendment can I ask for?

If you have received a grant agreement that you have countersigned, and you want to request a change to the terms of the grant, below is a list of the types of amendments you can request.

Type of change	What it means
No-Cost Extension	More time to complete grant activities.
Other Report Date	Do you need to request a change in report due dates? If so, enter new report due dates in the narrative description below and tell us why you are requesting a revised reporting schedule. Depending on the type of grant you received and if your revised dates are approved, you will either receive a simplified notification that your request was approved or you will receive an amendment letter for your countersignature.
Payment Date	Do you need to request a change in payment dates outlined in the original agreement? If so, please submit a revised payment schedule along with a brief narrative justification. If your revised payment schedule is approved, you will either receive a simplified notification that your request was approved or you will receive an amendment letter for your countersignature.
Budget Modification	Do any of the scenarios apply to your budget modification request? • Add a new budget line item • Adjust existing allocations more than the permissible percentage indicated in your agreement • Re-allocate additional funds to Salaries and Benefits

Type of change	What it means
	If your request falls in one of these categories, submit a revised budget in the attachments section, and complete the narrative field justifying the request. If your request is approved, you will either receive a simplified notification that your request was approved or you will receive an amendment letter for your countersignature. Please keep in mind that budget modifications do NOT involve additional funds to an awarded grant. If you would like to request supplemental funds for your project, please send a message to your program contact.
Scope of Work	Do you want to make a substantive change to the grant activities? Are there new constraints in your operating environment that necessitate a change in your approved activities? If so, choose Scope of Work. Please provide a narrative description of the proposed changes as well as a justification for the revised scope of work and a revised budget that reflects costs associated with your new activities. If your request is approved, you will either receive a simplified notification that your request was approved or you will receive an amendment letter for your countersignature.
Unspent Funds	Do you have unspent funds due to savings or exchange rate gains? If you want to use the funds for other activities that are related to the approved grant, provide a brief narrative description of the activities, and a summary budget of how the unspent funds will be spent. If your request is approved, you will either receive a simplified notification that your request was approved or you will receive an amendment letter for your countersignature.

Type of change	What it means
Other	If you are requesting a change that does not meet any of the criteria described above, please chose “Other.” Include an explanation of your request in the narrative description field, and attach any relevant documents that support your request. Examples include, but are not limited to: • Change of grantee’s legal name • Change of grantee’s tax status • Change of fiscal agent • Removing a fiscal agent • Spinoff of sponsored project • De-obligating grant funds • Reducing a grant period • Termination

How do I request a grant amendment or a no-cost extension?

Do you need more time to complete grant activities? Would you like to request a budget modification?

This article outlines the steps to request an amendment to your awarded grant.

⚠ Please note that you can not request an amendment if the grant end date has already passed. If the grant term has completed, but you still need more time, please reach out to your program staff contact.

From the Proposals/Grants tab, click the Amend icon next to the grant you would like to amend.

Profile Grantee Dashboard Explore Grant Opportunities

Dashboard

If you do not see all of your OSF grants listed under the "Proposals/Grants" tab, please email: granteefeedback@opensocietyfoundations.org. New proposals are only accepted in response to solicitation emails and open calls posted on our public website and under the [Explore Grant Opportunities](#) tab. Please review opensocietyfoundations.org/grants or contact your program officer.

Please see our [job aids](#) for step-by-step instructions on navigating the portal.

Proposals/Grants

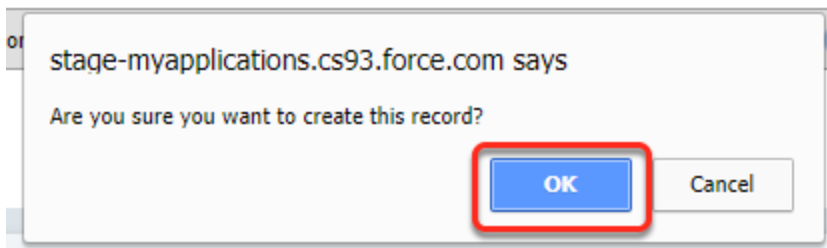
Open Items Closed Items

Show 10 Entries Search

▲	Edit	View	Delete	Amend	Grant Number	Proposal Name	Portal Status	Start Date
					All	All	All	All
▼	Q			📄	OR2016-26314	General Support	Awarded	3/1/2016
▼	Q			📄	OR2016-28150	Consolidation of Democracia Abierta	Awarded	6/1/2016
📄	Q				OR2018-39723	Help the Children Today	Application Re-Opened	2/13/2018

Showing 1 to 3 of 3 Entries Previous 1

Click Ok.



An amendment record will open. Current grant details are displayed at the top of the record:

Profile Grantee Dashboard Explore Grant Opportunities

Opportunity
A-01143

Grant Amendment Request Cancel Review/Submit

If your request meets certain criteria for expedited review, you will receive an automated message approving the amendment request from the entity within the Open Society Foundations that has awarded your grant. The email will be sent from this email address: noreply@salesforce.com.
If your request does not satisfy these criteria, but your amendment is approved, you will receive an agreement that you will have to countersign in order for it to take effect.
Please review [this article](#) for details on the types of amendments you can request.

Current Grant Details

Organization Name
Organization 123

Proposal Name
General Support

Grant Number
OR2016-26314

Current Grant Start Date
3/1/2016

Current Grant End Date
2/28/2018

Upcoming Other Reports

Grantee Report	Report Type	Status	Due Date	Report OverDue

Upcoming Final Reports

Grantee Report	Report Type	Status	Due Date	Report OverDue
GR-000300916	Annual	Scheduled	3/31/2018	No

Upcoming Payments

If you are requesting a no-cost extension, enter the proposed end date, proposed final report due dates, and a narrative justification for the extension.

Grant Amendment Details

If you are requesting an extension to your current grant period please provide a proposed end date, proposed final report date, and the reason you require this extension. If you do not need an extension and are requesting an amendment for a different reason you may skip this section.

Proposed Grant End Date ¹

8/1/2018

Proposed Final Report Due Dates ²

10/1/2018

Narrative Justification for Period Extension ³

Because of delays with securing visas for fellows, we request an additional 3 months to complete the project.

109 of 1000 Characters

If you are requesting another type of amendment, choose the value from the list and enter a brief description of the request.

Other Amendment Scenario ¹

Available

Other Report Date
Payment Date
Scope of Work
Unspent Funds
Other



Chosen

Budget Modification

Other Amendment Scenario Summary ²

We would like to re-allocate \$10,000 from publications to travel to cover additional visa costs and the change in venue.

120 of 1000 Characters

Attach any supporting documentation. Click save.

If you have any additional documentation in support of your amendment request, please attach it below.

Supporting Documentation

2

Revised budget|

14 of 1000 Characters

1

Choose file

Proposal.docx

3

Upload

By submitting this amendment request, the Grantor expects the Grantee to continue to fulfill the obligations, terms, and conditions of the grant agreement originally awarded and as amended, if applicable. The Grantor's approval of the amendment request is based on the Grantee's information that was shared with or made known to the Grantor, including, but not limited to, tax status and the Grantee's ability to achieve the charitable purpose of the grant.

[Save](#)[Clear Changes](#)

Review the request. Click submit.

[Back to Record](#)[Print](#)[Submit](#)

Grant Amendment Request

If your request meets certain criteria for expedited review, you will receive an automated message approving the amendment request from the entity within the Open Society Foundations that has awarded your grant. The email will be sent from this email address: noreply@salesforce.com.

If your request does not satisfy these criteria, but your amendment is approved, you will receive an agreement that you will have to countersign in order for it to take effect.

Please review [this article](#) for details on the types of amendments you can request.

Current Grant Details

Organization Name	Organization 123
Proposal Name	General Support
Grant Number	OR2016-26314
Current Grant Start Date	Tue Mar 01 00:00:00 GMT 2016
Current Grant End Date	Sat Mar 31 00:00:00 GMT 2018
Upcoming Other Reports	Grantor Report Report Type Status Due Date Report OverDue
Upcoming Final Reports	Grantor Report Report Type Status Due Date Report OverDue GR-00030918 Annual Scheduled 3/31/2018
Upcoming Payments	

Grant Amendment Details

If you are requesting an extension to your current grant period please provide a proposed end date, proposed final report date, and the reason you require this extension. If you do not need an extension and are requesting an amendment for a different reason you may skip this section.

Proposed Grant End Date	Wed Aug 01 00:00:00 GMT 2018
Proposed Final Report Due Dates	Mon Oct 01 00:00:00 GMT 2018

[Narrative Justification for Period Extension](#)

Because of delays with securing visas for fellows, we request an additional 3 months to complete the project.

For any additional grant amendment requests, please select the appropriate scenario(s) from the list and provide a reason in the summary space below.

Other Amendment Scenario	Budget Modification
Other Amendment Scenario Summary	We would like to re-allocate \$10,000 from publications to travel to cover additional visa costs and the change in venue.

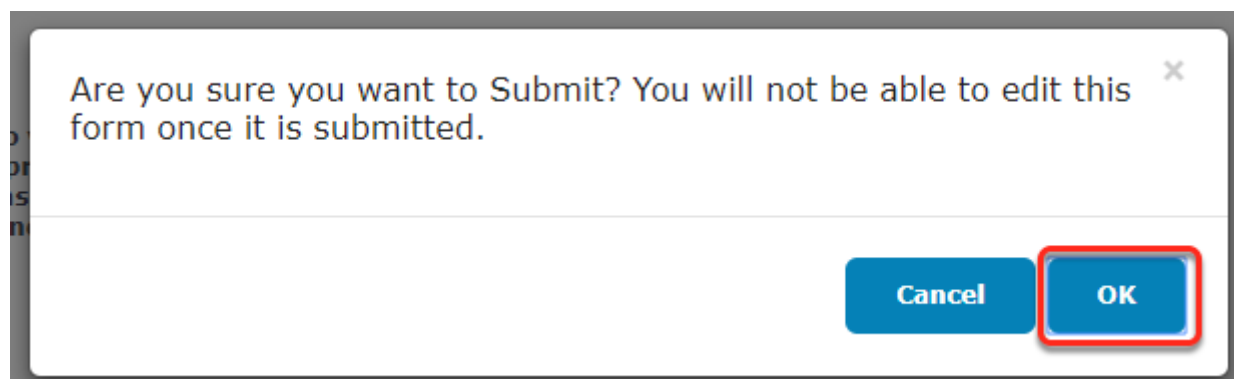
If you have any additional documentation in support of your amendment request, please attach it below.

Supporting Documentation

Sr. Number	File Name	Attachment Description (Optional)	Created Date
1	Supporting Documentation-Proposal.docx	Revised budget	03/02/2018

By submitting this amendment request, the Grantor expects the Grantee to continue to fulfill the obligations, terms, and conditions of the grant agreement originally awarded and as amended, if applicable. The Grantor's approval of the amendment request is based on the Grantee's information that was shared with or made known to the Grantor, including, but not limited to, tax status and the Grantee's ability to achieve the charitable purpose of the grant.

[Back to Record](#)[Print](#)[Submit](#)



Technical Help

Issues When Registering

This article will help you work through potential errors when attempting to register with the Grantee Communities Portal.

Email is already in use with this Organization



Portal Registration / **Step 1** / Step 2 / Step 3

Select One:
☒ **Organization** ☐ **Individual**

- This Email is already in use for this Organization. Please use different Email.

An **Organization** is an entity that submits grant applications on behalf of the group, such as a nonprofit organization, academic institution, or a private business.

Organization Legal Name *

?

EIN

?

An **Individual** is an applicant who submits grant applications on their own behalf, not representing an academic institution, organization, institution, or government. Individual applicants can only apply for funding opportunities that allow individual people to benefit from OSF funding.

If you received this error, it means you are attempting to register with an email that is already linked to a unique portal account. Please reach out to us at granteefeedback@opensocietyfoundations.org to help identify your already existing account.

Error with Application Attachments

This article will help you troubleshoot the error message "Error in processing attachments. Please contact the administrator."

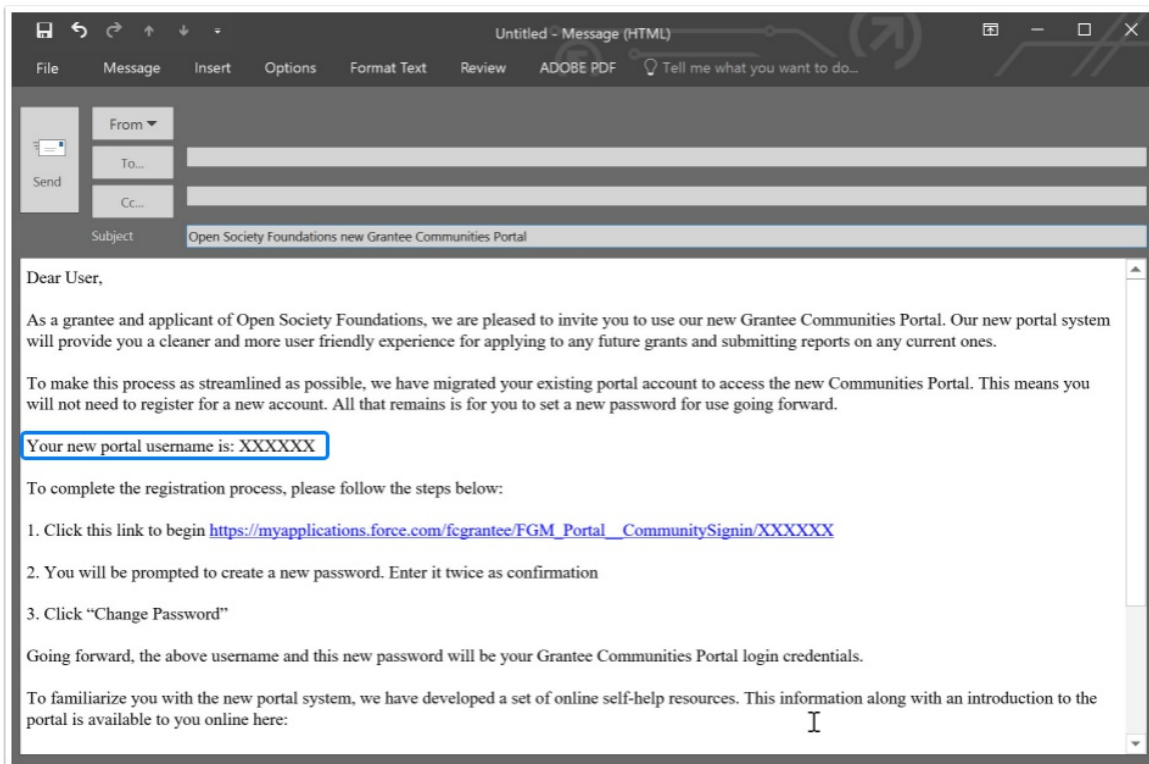
Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
No Attachments				
Attachment Description (Optional) 0 of 1000 Characters				
Choose file Upload		Error in processing attachments, Please contact to administrator. 		

This error occurs when your upload file name includes characters that the system doesn't recognize. For the purposes of uploading attachments please ensure your file name is made up of standard English letters and numbers. Avoid using any additional special characters except "-" or "_".

First Time Users- Unable to set my password

This article is related to our initial roll out of the new Grantee Communities Portal. For users who received a system generated welcome email with a link to set a new password.

If you received an email similar to the one below, it is because you had an account with our old portal system and we have automatically moved you over to the new Grantee Communities Portal.



The password reset link contained in your invitation email includes a security feature that disables the link after 24 hours. Clicking on an expired password reset link will automatically direct you to the Grantee Communities Portal login screen.

If this happens to you, the next step is to manually reset your password via the "Can't access your account" link on the login page.

English

Sign in

[Can't access your account?](#) | [New User?](#)

Welcome to the Open Society Foundations Grant Portal!

For a step by step guide and helpful information on how to use the Grantee Portal, please [click here](#) to review our online support resource.

Once you have reviewed this information you should be ready to register, apply, and monitor your active grants through the Portal. Once you are logged on to the Portal, be sure to look for orange help bubbles for additional information on specific fields.

If you encounter any technical issues or require support with the use of the Portal, please email granteefeedback@opensocietyfoundations.org. We actively monitor this account and will respond on a timely basis.

From there, you can enter the username included in your original email and you will get an email with a new link for resetting your password.

Having trouble logging in?

- Verify you're entering the correct user name.
- Passwords are case sensitive, so ensure you don't have caps lock enabled.
- Your account may be temporarily disabled from too many failed login attempts.

If you still can't log in, enter your user name to reset your password.

Continue