

## Regional Grant Management System



Boulder County  
Community  
Services



City of Boulder  
Housing & Human  
Services



City of Lafayette



City of Longmont  
Community  
Services

## 2023 Technical Assistance Guide



For technical assistance, please contact:

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## Create a New Account

### Deciding who should sign-up for an account

Foundant allows for multiple “contacts” or “users” to be associated with an organization. In addition, there are two different levels of access, a user can have, in the Grant Management System. It is the responsibility of each organization to manage their organization’s access to the Foundant GMS. Here are a few questions to think about when deciding how to best manage your organization’s access to the GMS:

- How many accounts need to be created [i.e., will your organization have one shared account or several accounts with their own unique log-ins? Or a combination of both - one shared log-in for staff and another separate account for a consultant (such as a grant writer)]?
- Which individuals should have access to the Foundant GMS?
- What is the appropriate level of access for all of the individuals who will use the system (see table below for more information)?

### Account/User levels:

<b>Full-access</b>	<ul style="list-style-type: none"><li>• Account type created when you register for an account (using the instructions below under “Creating a new account”).</li><li>• Gives full access to the organization’s profile including the ability to update contact information and view current and historical fund requests.</li><li>• Access to all of the funding opportunities available in the system.</li><li>• Can start and complete applications.</li></ul>
<b>Collaborator</b> ( <i>Access to all forms within a fund round request ONLY (i.e., application, follow-up forms, etc. when applicable)</i> )	<ul style="list-style-type: none"><li>• You must be invited by a “<b>Full-access</b>” user to register for this type of account.</li><li>• Gives access to an organization’s current (draft) fund requests. *There are three levels of access that can be given to a collaborator (“view”, “edit”, or “submit” fund requests).</li></ul> <p><i>*Collaborators can become full-access users at the discretion of the organization (please see “Registration” on page 10, for more information)</i></p> <p><i>*Likewise, the <b>collaborator feature</b> can be used to add additional user accounts for your organization. (please see page 11, for more information on the collaborator feature. Also see page 10, for more information about creating multiple accounts in Foundant).</i></p>

## Registering

Creating a new account is a multi-step process, follow the instructions below to create a new account.

\*Please note, if this is your first time applying for a grant in the Foundant Regional Grant Management System, you will need to create an account (including current and former grantees).

1. From the Logon page, click **Create New Account**.
2. Once organization information has been entered, click **Next**.
3. Enter the user information in the following section, click **Next** when complete.
  - This section is your information.
  - If your address is the same as your organization's, you may use the *Copy Address from Organization* button to automatically pull the address information from the organization address fields into the address fields in this section.
  - The email address entered in the *Email/Username* field becomes your username in the system.
  - Should you need to navigate to the previous section in the registration process, you must use the "**Previous**" button at the bottom of each section in order for the information entered in registration fields to remain intact. If you attempt to navigate to the previous section by using the browser's back button, you will lose all registration information you have entered.
4. The next section is titled "CEO, President, Executive Director".
  - If you are the "CEO, President, Executive Director", select Yes and click Next.
  - If you are not the "CEO, President, Executive Director", select No, click Next, and complete the required "CEO, President, Executive Director" fields.
5. Once the CEO, President, or Executive Director's information is entered, click **Next** to create a password.
6. Create a password for your account and click **Create Account**.

## Email Confirmation

Upon creating an account, you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system.

1. Follow the on-screen instructions and click **Continue** to finish the registration process.
2. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.

\*If you do not receive the email confirmation, please reach out to Markisha Key-Hagan at [key-haganm@bouldercolorado.gov](mailto:key-haganm@bouldercolorado.gov) for assistance. It is critical that communication with the system is established to receive notifications and other communications from City of Boulder, Boulder County, and/or City of Longmont staff.

## Logging-on to the Foundant GMS

Upon completing registration (using the steps above), you will immediately be logged-in to the system. For subsequent visits to the system, you will need to log-in using the username (email) and password you provided during registration.

### Forgot/misplaced passwords

If you forgot or misplaced your password, click the “Forgot your password?” link located right under the “Log On” and “Create New Account” buttons. Enter your email address and select “Send Reset Link”. Go to the inbox for the email you just entered and look for an email from Foundant. Open the email and follow the instructions. Return to the login page and proceed to login. If you do not see the email from the Foundant GMS in your inbox, be sure to check your email’s “junk” folder.

### Regional Grant Management System



### Logon Page

Email Address\*

Password\*

Log On

Create New Account

[Forgot your Password?](#)

Welcome to the Regional Grant Management System!

New Users: Please click on "Create New Account" to complete the registration process and create your logon credentials.

Existing Users: Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password?" link to the left to reset your password.

Not sure? If you think that you or someone at your organization has already registered in the system, do not create a new account. Please contact our Grant Administrator at Markisha Key-Hagan at [keyhaganm@bouldercolorado.gov](mailto:keyhaganm@bouldercolorado.gov) to receive your username.

For assistance navigating the online grant management system, download the [How to Apply Technical Guide](#).

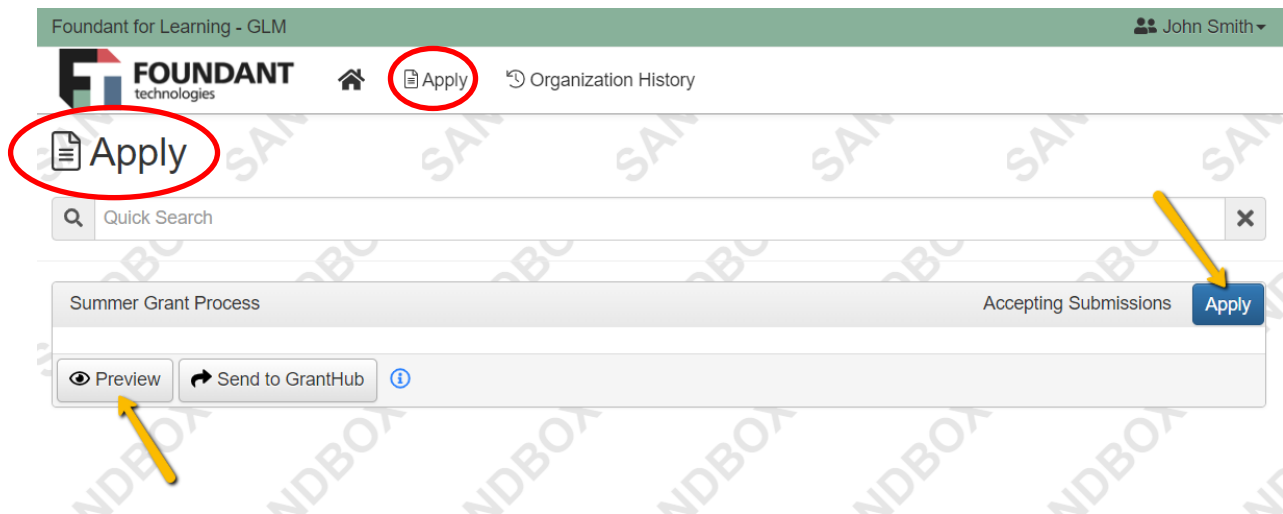
For any questions, contact Markisha Key-Hagan at [keyhaganm@bouldercolorado.gov](mailto:keyhaganm@bouldercolorado.gov).

## Apply For Funding

Upon completing registration and accessing the system for the first time, you will land on the “Apply” page. This page will show you any currently open opportunities that you can apply for, as well as any relevant deadlines and other applicable information related to them. After you have started an application draft, you will be taken to your “dashboard” upon logging on. To get back to the “Apply” page, you can click on the “Apply” icon in the ribbon at the top of the system page.

### General Information

1. You can preview the application without having to save any work by clicking on the **Preview** button.
2. To start a request, click on the blue **Apply** button under the opportunity you’d like to apply to.
  - This will take you into a form to complete and submit.



3. Once in the form, note that your contact and organization information automatically populates at the top of the form.
  - You may update your contact information and view your email history.
  - **Organization information:**
    - Currently, you will only be able to update the following contact information for your organization:
      - Web site
      - Telephone Number
      - Email
    - Please contact the Grant Management System Administrator, Markisha Key-Hagan, at [key-haganm@bouldercolorado.gov](mailto:key-haganm@bouldercolorado.gov) to change any of the other “Organization Information” fields.

4. If you'd like a PDF copy of the application, you can click the Question List button.

Foundant for Learning - GLM John Smith

**FOUNDANT** technologies

Apply Organization History

Contact Info Request

**Applicant:**  
Mr. John Smith  
john.smith@example.org  
123-123-1234  
123 Main St.  
New York City, NY 12345

**Organization:**  
John's Org  
12-1234567  
123-123-1234  
123 Main St.  
New York City, NY 12345 United States

Contact Email History

If your organization information does not appear correct, please click the edit (pencil) icon.

LOI

Question List

Fields with an asterisk (\*) are required.

Project Name\*  
Name of Project.

Amount Requested\*  
#

5. Please note the **deadline indicated on each application**. Applications will not be accepted after this date.
6. Once you've completed the form, you may click the **Packet** button to download a copy of the questions and your responses.

## Detailed Apply Information

1. Work your way through the form responding to the fields.
  - Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.
  - As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
  - You may notice that questions are divided into sections indicated by a gray bar that contains a title/name and the corresponding questions below it. These are referred to as question groups. You may collapse question groups as you go, once you've finished all of the questions in that group, by clicking on the arrow next to the question group name. This can help serve as an indicator to yourself that you've completed that section and reduce scrolling.

Regional Grant Management System

Select Language ▼

Search ▼ Tools ▼ Communications ▼ Reporting ▼

Application

Preview As Applicants Question List

Process Manager / City of Boulder 2023 Health Equity Fund Round / City of Boulder 2023 Health Equity Fund - Application / Preview

Fields with an asterisk (\*) are required.

Pre-Qualification

**Pre-Qualification**

Please answer the following questions to determine whether the agency meets the minimum criteria for submitting an application.

**Agency Type\***

Please select your agency type.

**Federal Nonprofit Status\***

Does your agency have federal non-profit status [e.g. 501(c)(3)]?

☐ Yes

☐ No

☐ N/A - Not Applicable

**Agency provides health and human services to specifically identified target populations.\***

Is this proposal for services that predominantly impact City of Boulder residents experiencing health disparities (see RFP for details)? [\(link needed here\)](#)

☐ Yes

☐ No

**City of Boulder Health Equity Fund Program Priorities\***

Select **ONE** of the following City of Boulder Health Equity Fund Program Priorities, that best reflects the proposal.

- Some fields have character limits.
  - You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.
  - Responses that are longer than the set limit will be saved, but an error message will appear informing the applicant that the limit has been exceeded.
- File upload fields will only accept one file per field.
    - Follow the name convention noted in each question/field.
    - If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing you that the file is too large and the file *will not* be saved.
    - If you attempt to upload a file in an unaccepted file type, you will receive a warning that the file type is not acceptable; and you will not be able to upload the file.
    - Upload fields have size limits.
    - Upload fields may also have file type restrictions.
    - Once a file has been uploaded, it may be deleted by clicking the red X next to the file name and a new file can be uploaded.
  - Even though the system is auto-saving, there is still a Save button at the bottom of the form.
    - If you click **Continue** you will be taken back into the form so you can continue working.
    - If you save and exit the system, you will access the draft of the form from your dashboard the next time you log in.
    - Pick back up where you left off by clicking the Edit link to the right of the request.
    - When you click **Save**, you are taken to a confirmation page so you know the save was successful.
  - When all of the fields are complete, submit the form.
    - If any required fields were not completed, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.



- An error message appears listing the fields that need to be completed or edited.
- These fields are outlined in red, so they are easy to identify as the applicant scrolls through the form.
- When a form is submitted successfully, the applicant will be taken to a confirmation page.
- When you click Continue, you are taken to your dashboard where you can view your submitted request.
- Once an application has been submitted, you can no longer edit it.

## **Applicant Dashboard**

Your dashboard houses current and historical requests (if you have previously submitted an application in the Foundant GMS).

The Active Requests tab houses all current requests. These are the requests still requiring action, awaiting a decision, and/or requests that have not yet been marked closed by the site administrator. Within each request you can see forms, form statuses and submission dates, and, if applicable, form deadlines.

- You may continue working on saved forms by clicking the edit option next to the form.
- You may view forms that have been submitted. Once submitted, you cannot edit them.
- You can also see the request's decision status.
- The status will show "Undecided" until the site administrator posts a decision.
- Timing on decision status updates vary depending on the Funder.

Denied requests and requests marked closed by the site administrator are housed in the Historical Request tab.

If you wish to edit your account information or change your password, click your name in the top right. This will expand a drop-down menu where you will have the option to edit your profile information, including changing your password. Be sure to click save in the bottom right once you've finished.

Please note, that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending time out).

## Frequently Asked Questions (FAQ)

### Registering

1. **When I tried registering for an account, I received a message saying that my organization's EIN has already been used. Can I still create an account or get access to the system?**

Yes, there are multiple options for getting access to the system.

- a. ***If you are the Executive Director/CEO/President:*** By default, an account for the Executive Director/CEO/President, is created when anyone from your organization (who is not the Executive Director/CEO/President) creates an account. This information is requested from them during registration. The Executive Director/CEO/President will need to claim or activate their profile by requesting a password. Follow the steps on p. 5 under "Forgot/misplaced passwords" to create a password.
- b. **Grant-writers and other staff (limited-access to the GMS):** If you are consulting with an organization as a grant-writer or are another staff member that will contribute to the application but does not need full-access to the GMS, you can use Foundant's built-in feature called the "Collaborator Feature". The collaborator feature allows organization's to invite individuals to collaborate on an application. The person invited to collaborate on the application will be required to create an account – username and password only. Please see the "Collaborator Feature" tutorial [here](#).
- c. **Grant-writers and other staff (full-access to the GMS):** The collaborator feature can also be used as a tool by organizations to create additional accounts for users that will be associated with an organization. Please see the section titled "Adding New Users to Your Organization" in the "Collaborator Feature" tutorial [here](#).

2. **Can multiple people from my organization have an account?**

Yes, multiple people from an organization may have an account. Please note, that if someone tries to register for an account and that organization already has an account (another staff person has already registered), the new person attempting the registration will receive a "Duplicate EIN" message. At this point, in order to add additional users, that will be associated with your organization's profile, you will need to review the options above under FAQ Question #1 and follow the instructions listed under the option that best corresponds to your situation. If you have any issues adding additional users, please contact Markisha Key-Hagan [key-haganm@bouldercolorado.gov](mailto:key-haganm@bouldercolorado.gov) for more assistance.

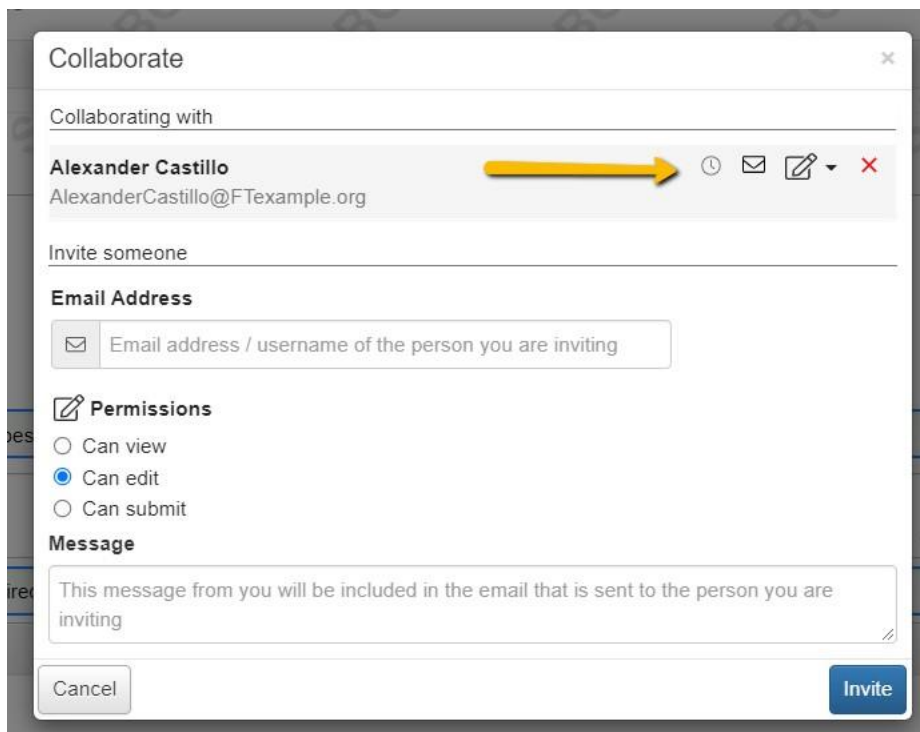
3. **Which level of access to the grant management system should I give to a user that will be associated with my organization?**

The level of access given to any user should be based on the unique needs of an organization. Please see the User/Access level table (on p. 3) for an explanation on the different user levels and the corresponding access given for each level.

## Collaborating with Others on a Funding Request Application

### 1. Which level of permission should I give to my collaborator when using the “collaborator feature”?

When inviting someone to collaborate with you on a funding request, Foundant will ask you to assign that person a permission level. The three options are “view”, “edit”, or “submit”. The level of permission assigned should be based on the role of the collaborator. For example, if the collaborator will only need to view the application, select “can view” and so on. Please note that the permission level increases as you go down the list (with “Can submit” being the highest level) and that each permission level is inclusive of the level above it. For example, if you choose “Can submit” the collaborator will be able to view, edit, and submit the application.



The screenshot shows a 'Collaborate' dialog box with the following sections:

- Collaborating with:** A list showing 'Alexander Castillo' with email 'AlexanderCastillo@FExample.org'. A yellow arrow points to the name. To the right are icons for a clock, email, edit, and a red 'X'.
- Invite someone:** A section with an 'Email Address' field containing the placeholder text 'Email address / username of the person you are inviting'.
- Permissions:** A section with three radio button options: 'Can view', 'Can edit' (which is selected), and 'Can submit'.
- Message:** A text area containing the message: 'This message from you will be included in the email that is sent to the person you are inviting'.
- Buttons:** 'Cancel' and 'Invite' buttons at the bottom.

### 2. Where can I find more information on Foundant’s “Collaborator Feature”?

You can read more about the “Collaborator Feature” and watch a video on how to set it up by viewing Foundant’s support hub tutorial on the “Collaborator Feature” [here](#).

## Other Questions

### 1. If I still have questions, where can I go for help?

For all other technical assistance related questions, you can either:

- Consult the Foundant Support Hub [Grant & Scholarship Lifecycle Manager – Foundant Technologies](#)
- Reach out to the Regional Grant Management System’s Administrator Markisha Key-Hagan at [key-haganm@bouldercolorado.gov](mailto:key-haganm@bouldercolorado.gov) or 303-441-3146