Attachment 1

GrantVantage®

Step-by-Step Applicant Guide

Applicant Steps

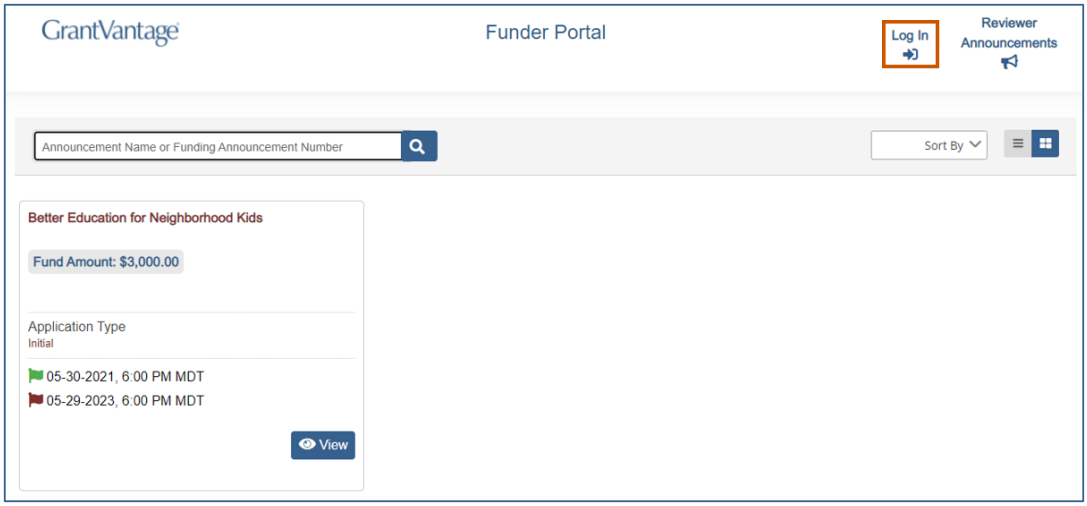
All applicants will follow a series of steps to create and submit their proposed project application. Every applicant must:

1. Register and/or Login
2. Complete the Applicant Organization Profile
3. Submit an application:
    - Answer applicant questions
    - Complete the Objective Template (if required)
    - Complete the Budget Template (if required)
    - Save & submit application
4. How to open and print application reports

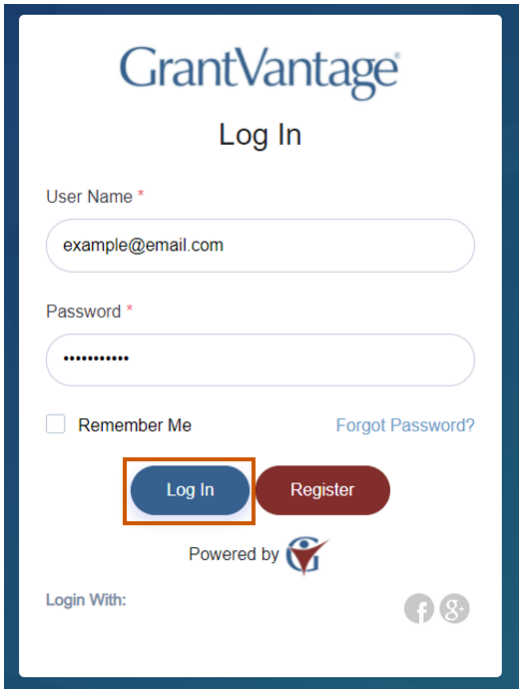
This step-by-step guide will help applicants navigate GrantVantage, personalize their Applicant Organization profile, and submit their fully customized unique Project Application.

Step 1: How to Login/Register an Applicant

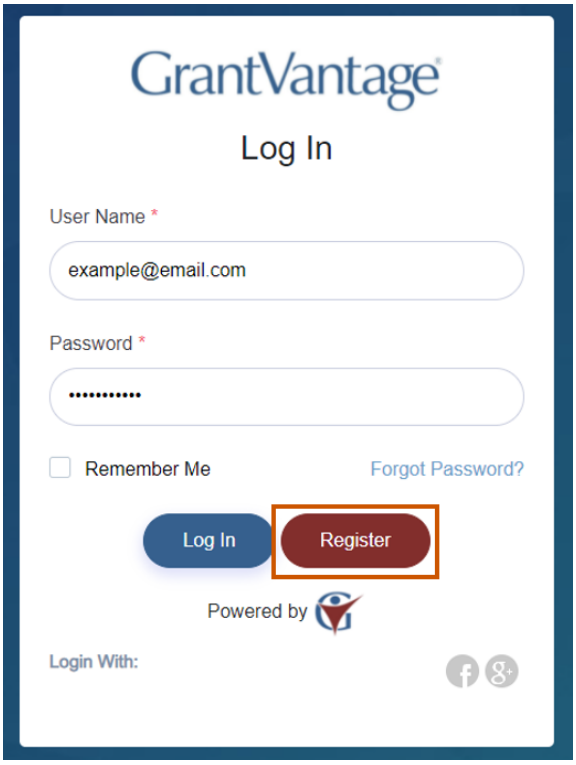
1. Click **Log In** . From the Log In screen, new users must register into the system.



2. Enter login credentials and select **Log In.**



Or
Optional: Click **Register** and complete the Registration form.


GrantVantage
Log In
User Name *
example@email.com
Password *
Remember Me
Forgot Password?
Log In
Register
Powered by
Login With:

Homepage

On the homepage, you can view all published funding announcements and navigate to submitted applications or the applicant organization profile.

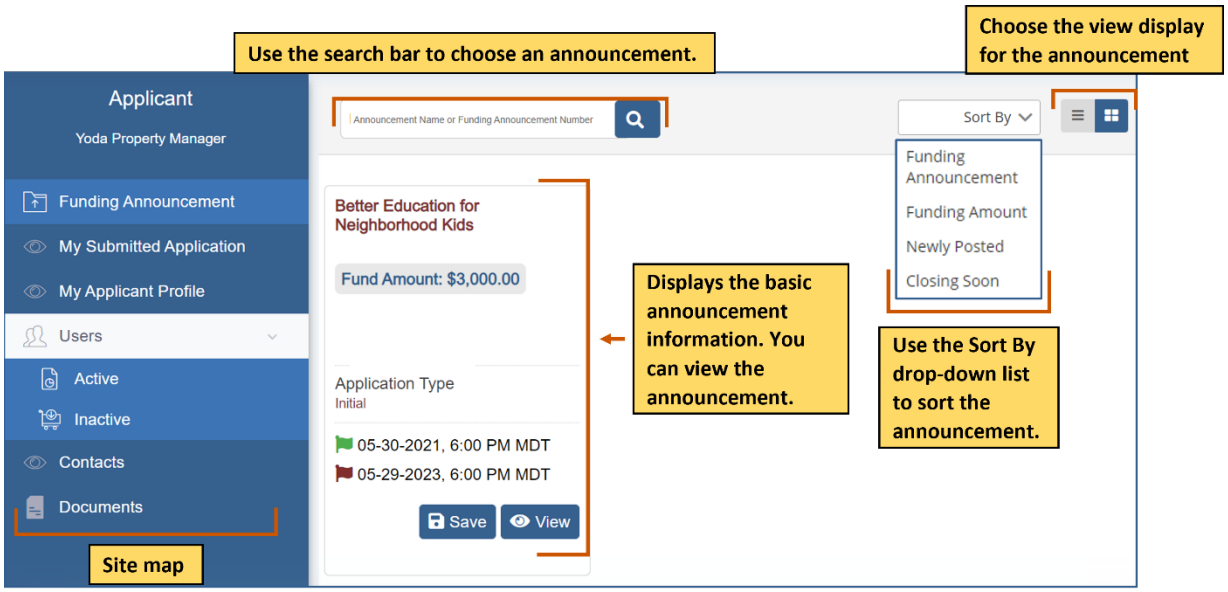
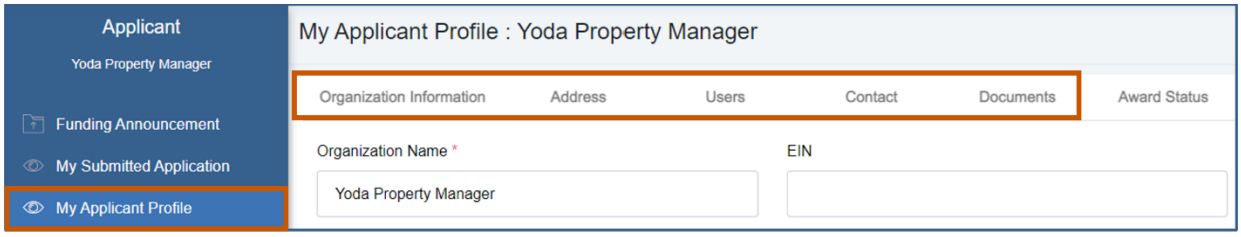


Figure 4: Homepage

Step 2: Complete the Organization Profile

1. Complete the Applicant Profile. Select **My Applicant Profile** and add Organization Information, Physical & Mailing Addresses, Users, Contacts, and Documents.



Remember to always save your work!

Figure 5: Fill Out Applicant Profile

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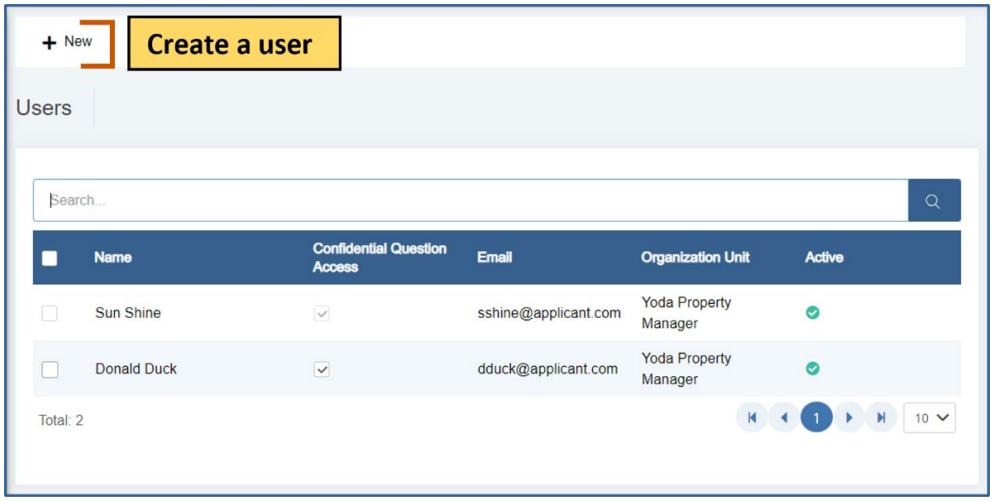
Note: As the Primary Applicant User, you may add a secondary Delegate User with separate login credentials to help you complete the application.



Step 3: How to Apply

1. On the Applicant Dashboard select **View** to see the Funding Announcement.

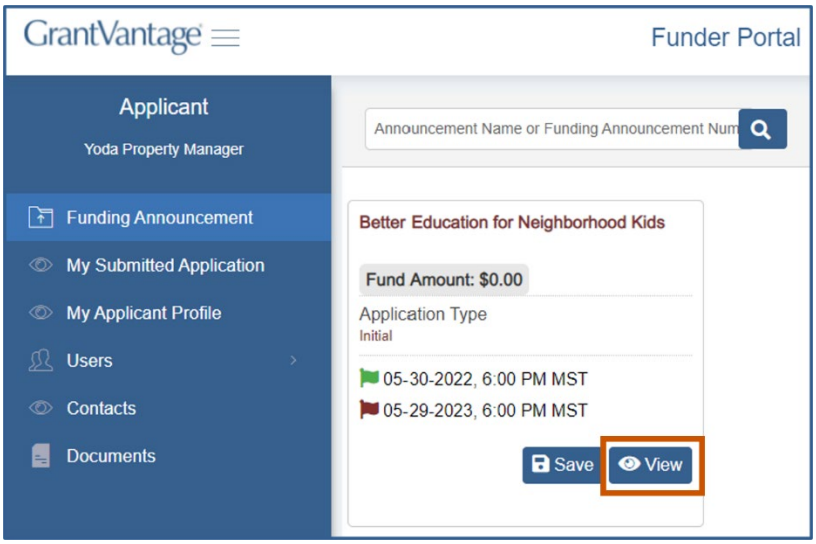


Figure 7: Funding Announcement – View

2. On the Funding Announcement page, select **Apply**.

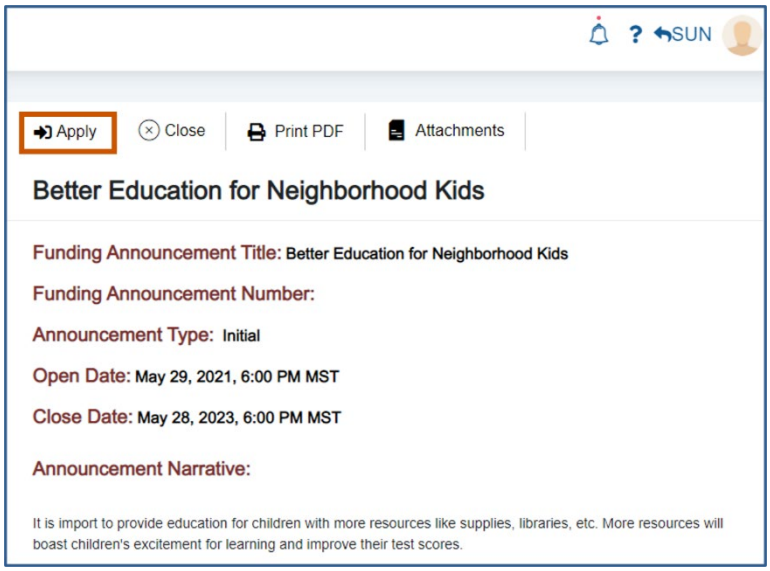


Figure 8: Apply to Announcement

3. Answer Questions

Note: Once you complete a tab item, the red x next to the name turns into a green checkmark. Make sure all questions are complete.

a. Use the hamburger menu to see all the questions.
Tip: The questions are color-coded to indicate the completion process.
- **Blue –** The question is in progress.
- **Gray –** The question needs to be viewed.
- **Green –** The question is complete.

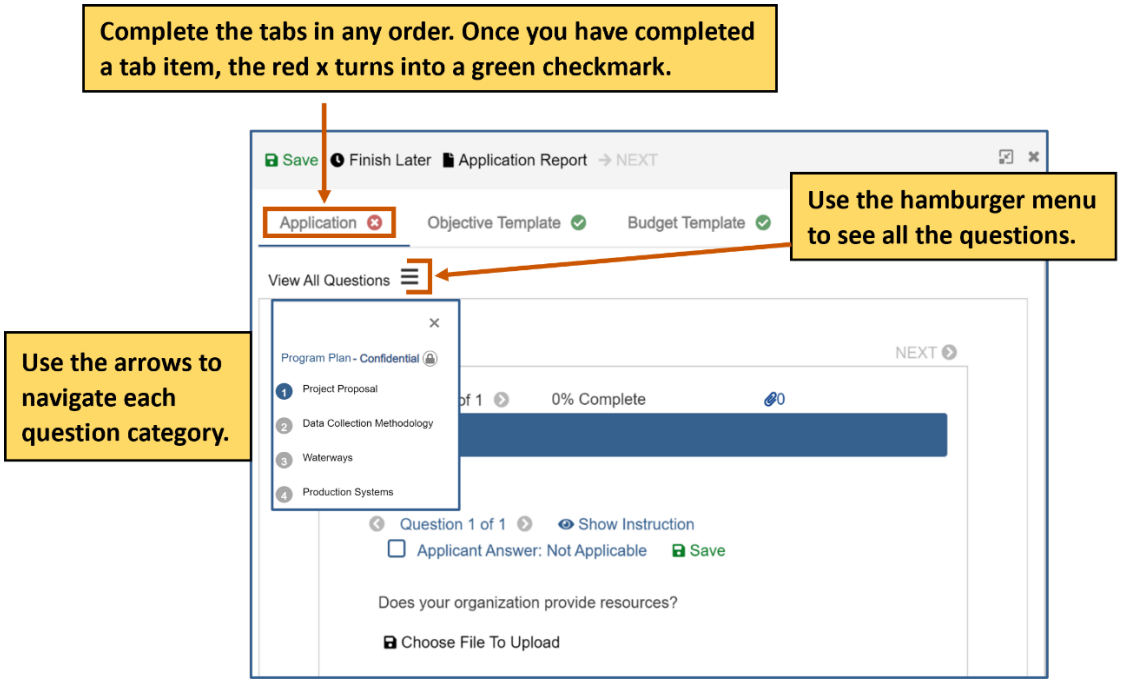


Figure 9: Use Hamburger Menu

b. Use the arrows to navigate the questions.

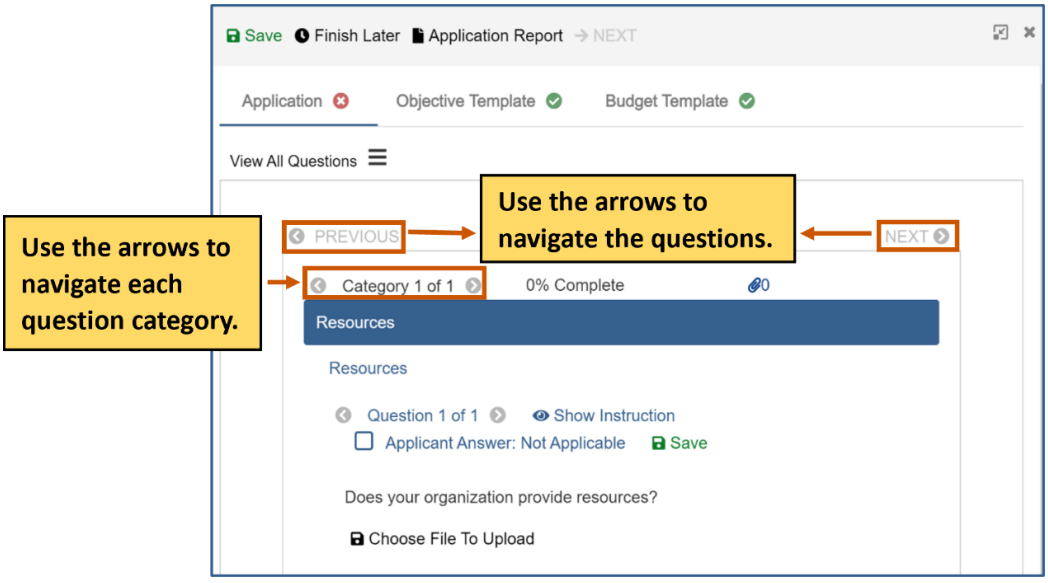


Figure 10: Use Arrows through Questions

Applicant questions must be 100% complete before application submission. You can also view documents attached to the application.

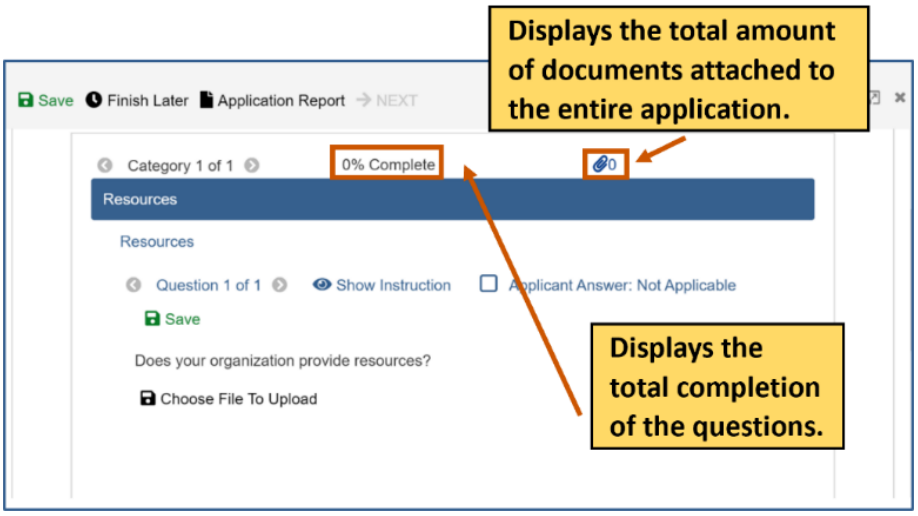


Figure 11: Question Completion

4. Complete the Objective Template.
    a. Click the Objective Template tab to add goals, objectives, performance measures, and grant activities. If goals are required, each objective must be associated with a goal.

    ⓘ **Note:** The performance measures and grant activities must be associated with an objective.

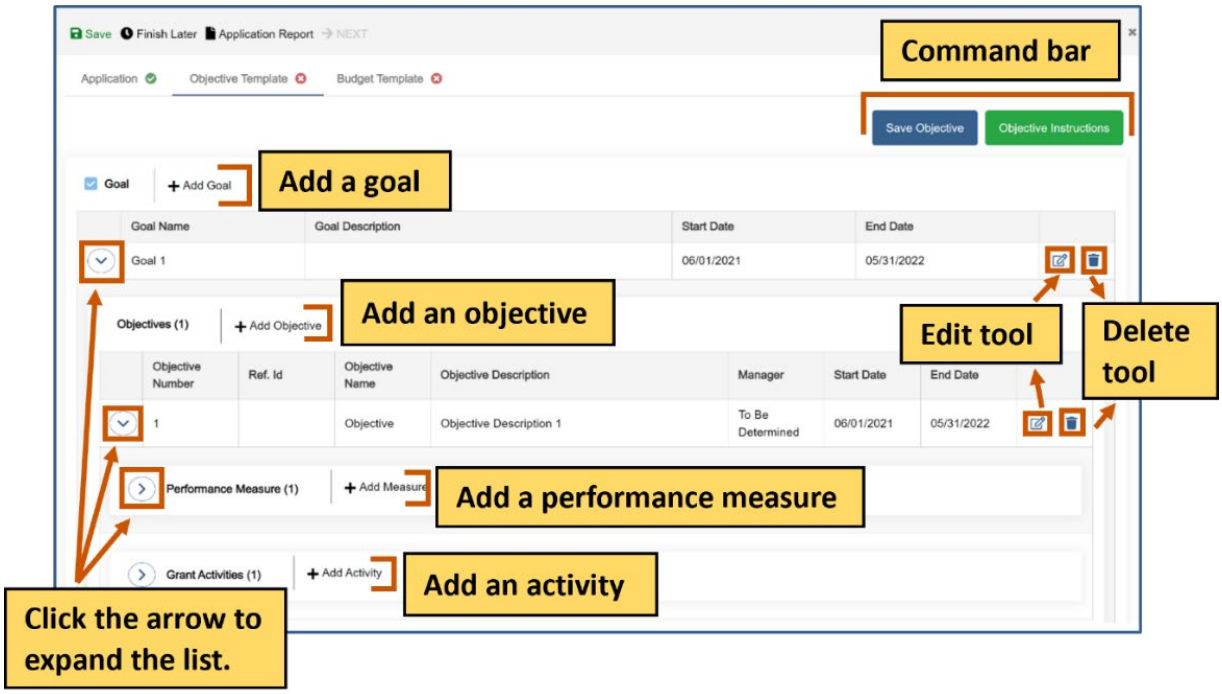


Figure 12: Objective Template

b. Click **Save Objective.** The Objective Template is saved and locked. The objectives must be saved and locked before you can submit the application. Click **Return to Draft** to unlock the Objective Template again to make changes. You can go in and out of draft during the application process.

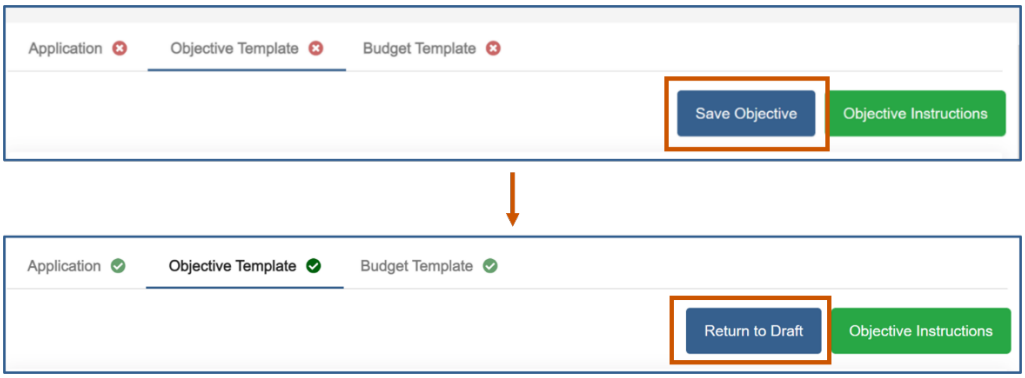
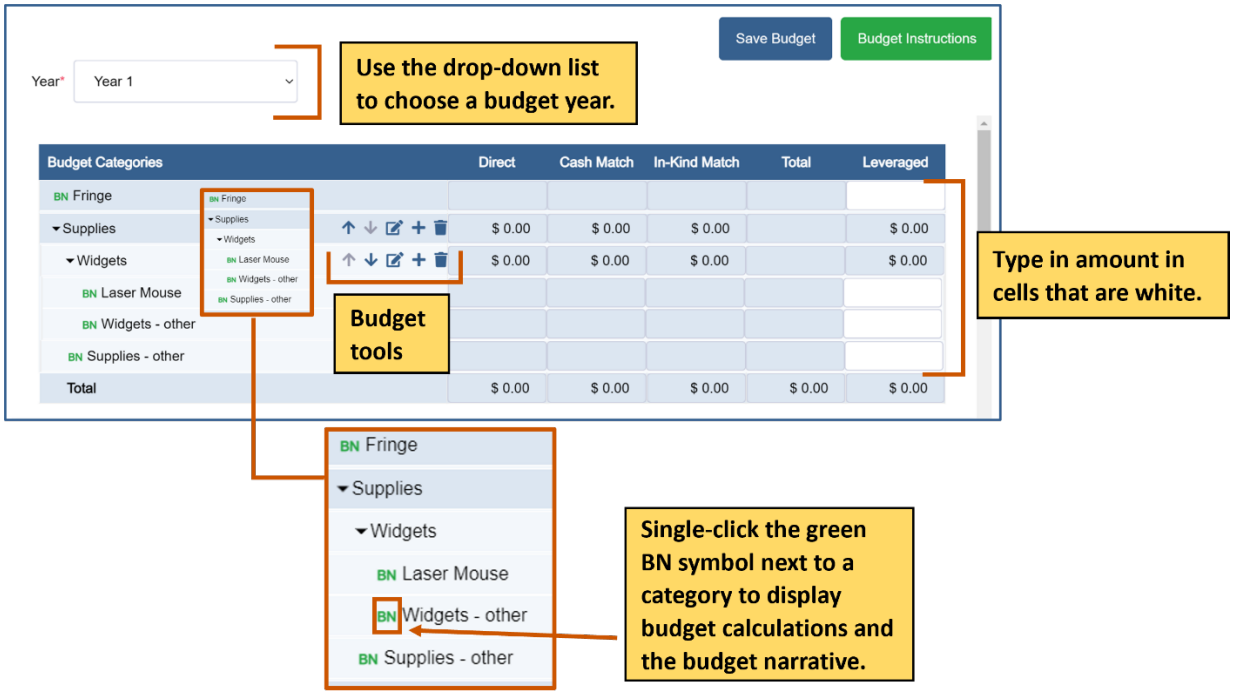


Figure 13: Save/Return Objective Template

5. Complete the Budget Template.
   a. Applicants can enter a complete budget by selecting the Budget tab from the Application Navigation. Edit and customize your budget by using the Budget Edit Tools. The Budget Edit Tools allow applicants to fully customized each budget to their unique project. Add new parent and sub-categories by selecting the ➕, change a category's placement by using the arrows, modify budget category names with the edit tool, and delete by selecting the trashcan.



b. Once your budget is complete, select **Save Budget** to save and lock the Budget template. The budget must be saved and locked before you can submit the application. Click **Return to Draft** to unlock the Budget Template again to make changes. You can go in and out of draft during the application process.

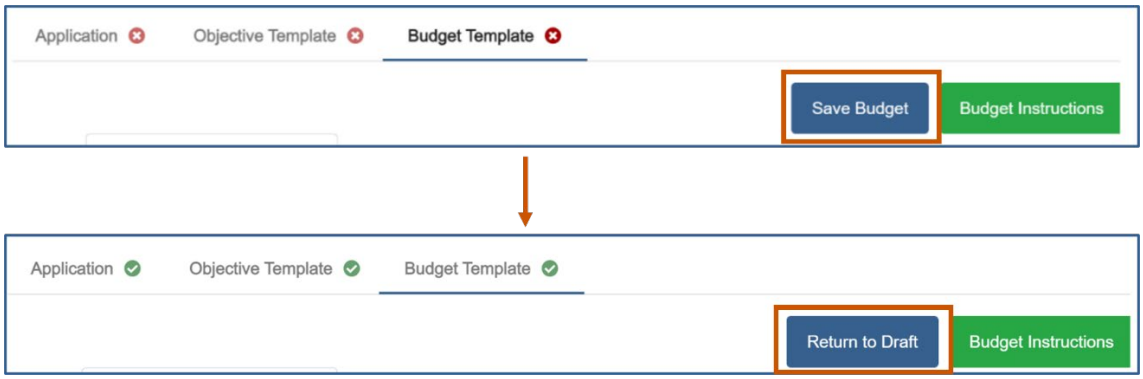
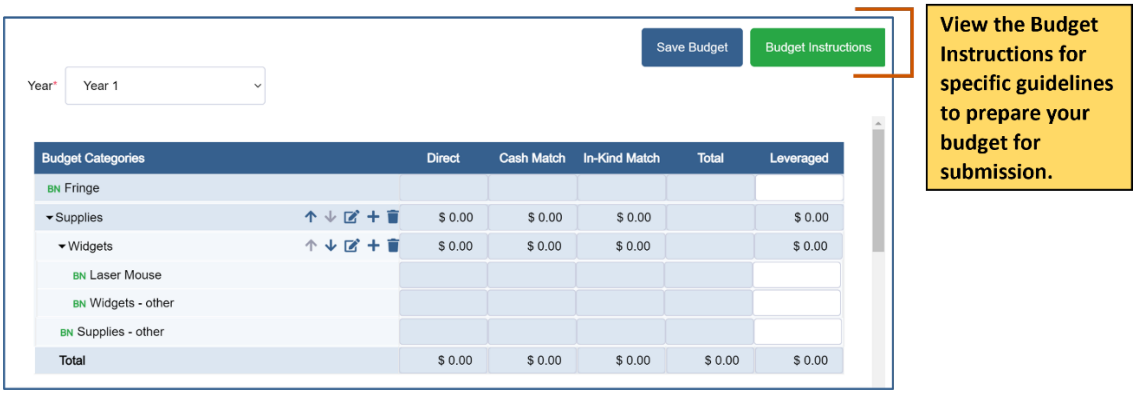
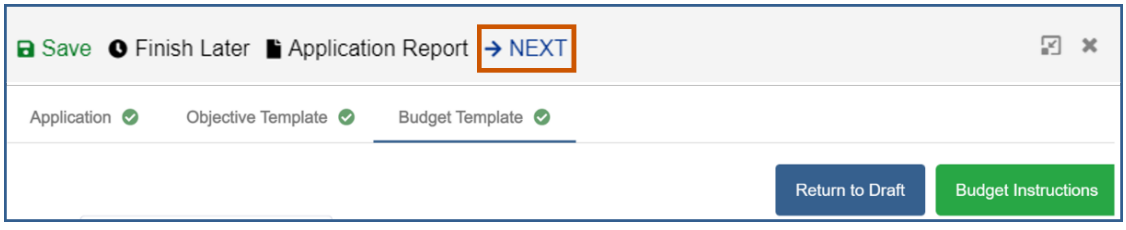


Figure 15: Save/Return Budget Template

c. View the Budget Instructions for specific guidelines to prepare your budget for submission.



6. Applicant questions must be 100% complete and the Objective and Budget Templates are saved for the → **Next** feature to unlock. This will be indicated by the green checkmarks next to each tab.

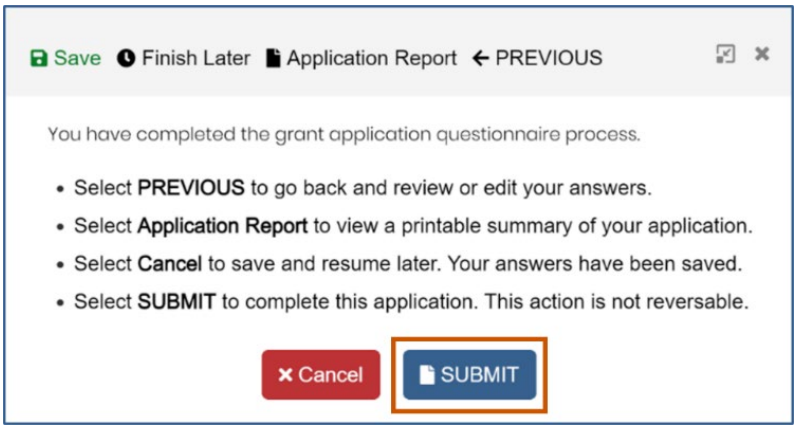


7. On the project details page, enter the Project Name, Requested Amount, Project Summary, and all required personnel. Once all details are entered, applicants may select ⏩ **Finish**.



Figure 18: Go to Submission Page

8. On the final page of the application ensure you have fully answered all questions and submitted all documents before selecting **Submit**.



Step 4: Open and Print Report

At any point during or after the application process, Applicants may view a complete report of the questions and answers.

1. From the site map, click  **My Submitted Application**. **Single-click** the blue arrow to display the Application, Objective, and Budget reports.

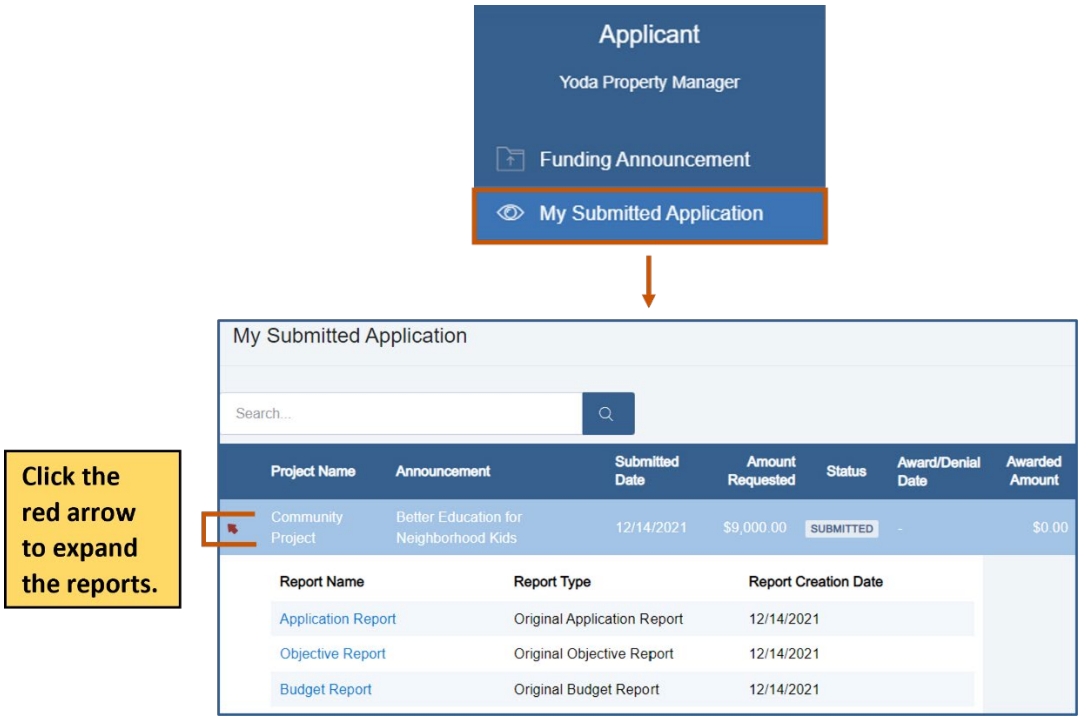


Figure 20: Access Reports

2. Select **Application Report** to open.

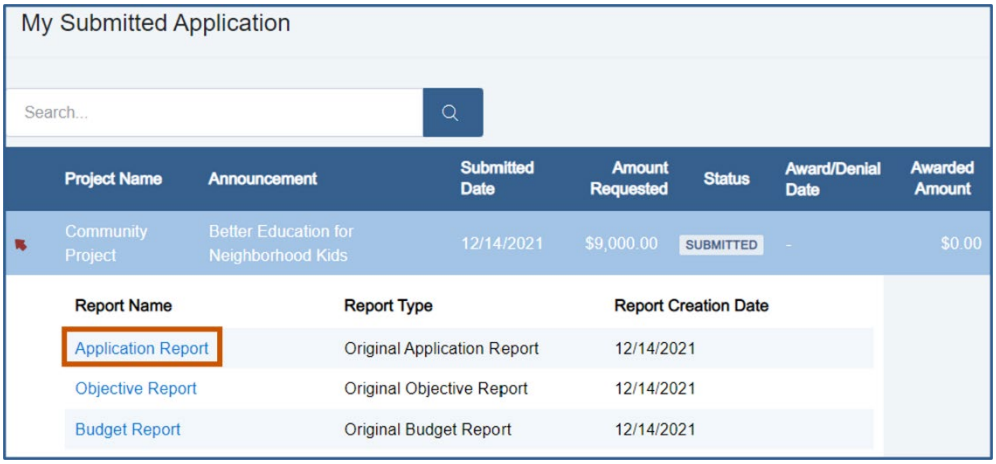


Figure 21: Select Application Report

3. Once the Report popup opens, users may view questions and answers or select **Print PDF** for a downloadable copy of their application.

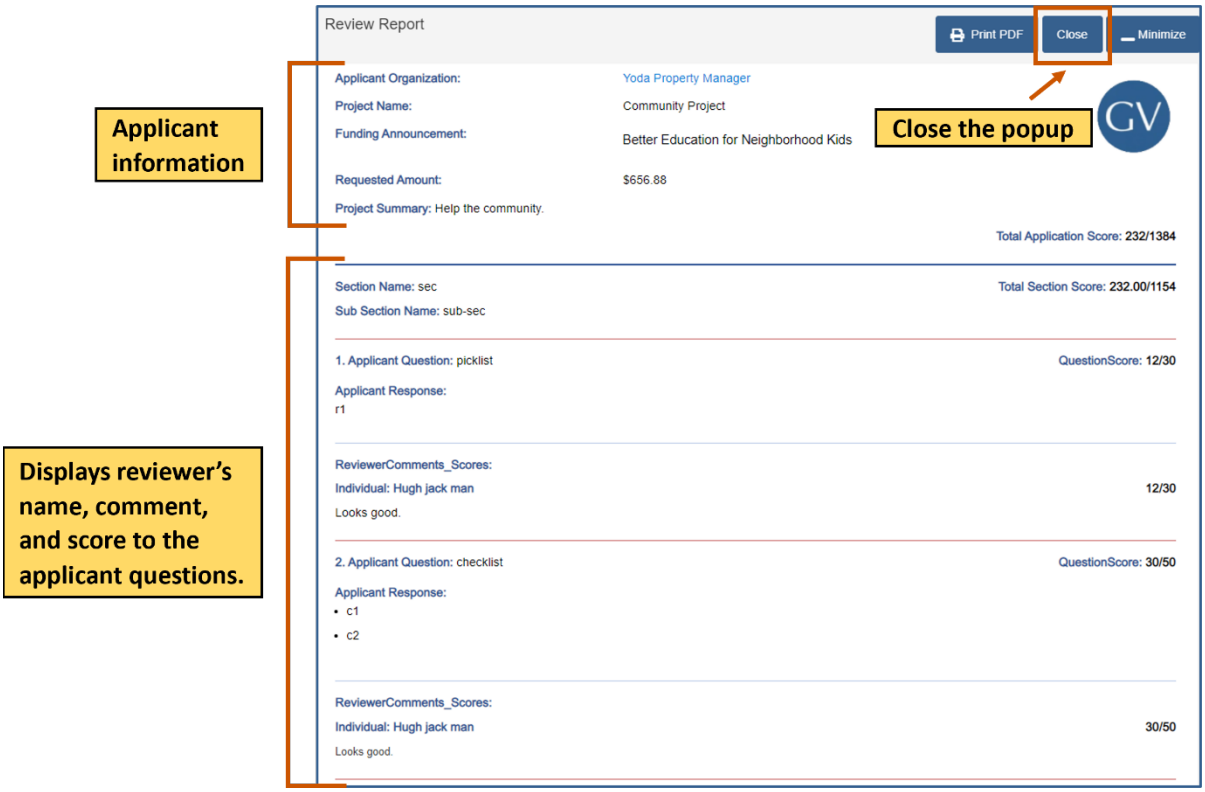


Figure 22: Review Report