



## Online Portal Technical Instructions & FAQs

Waco Foundation has moved to an online application system. The following document is provided to help navigate the technical aspects of the online portal.

### Accessing the System:

**New Users** must first register by clicking the "Create New Account" button on the Logon page.

**Returning Users** must log on to the system using their email address and password. Please do not create a second, new user account. There is a system prompt to assist you in the event you need to reset your password.

### Setting up a Profile

The registration process has four sections: (1) organization information, (2) individual user information, (3) executive officer information, and (4) choosing your individual user password. The registration process is straightforward; however, in some cases, it may be more complex when certain factors apply:

Each individual user is linked to a single organization. If you are submitting applications for different organizations, you will need to register separately using a different email address for each organization. For example, you are part-time staff at both Organization A and Organization B. In order to submit an application for both Organizations A and B, you will need to register using one email address for the application from Organization A, and you will need to register using another email address for the application from Organization B.

It is important to note that:

- During the registration process, you cannot save partial information. You should therefore gather all required information before beginning this section.
- Using the Browser's "Back" button may delete your information, so be sure to use the previous and next button offered inside the webpage, to move between pages.
- Use your organization's mailing address when setting up your user profile.
- Your password must be at least 6 characters in length and can contain letters, numbers and standard symbols.

## **What do I do if I forget the password to my application account?**

The Foundation staff does not have access to the email addresses or passwords used to create an applicant's account. We cannot reset your password or change the email associated with your account. However, the online system provides an option to reset a password if you forget it.

## **What If I need to Update Our Profile?**

If you ever need to update your user information, click on your name at the top right corner of the screen and select "Edit Profile" from the drop-down menu.

## **Starting an Application**

After you have registered you will be directed to the Application Page. You may want to bookmark this website address.

On the left side of the screen you will see "Request" and two options underneath:

- **Dashboard** (Application Status Page): This screen is your homepage where you can check the status of your grants. This page will display the form you just completed, the status of the form, and the next form in the process.
- **Apply** (Application Page): This screen lists the available grants for which you may be eligible to apply.

Via the dashboard, you can also:

- **Manage your grant application** by clicking "Dashboard" in the menu at the left side of the screen. The Application Status Page provides information regarding the status of open grant applications. From this page, you can download completed application forms and see the status of an application form you have submitted. If you have saved but not submitted an application form, you must access the form on this page to complete and submit the form.
- **Manage your awarded grants** by clicking "Dashboard" in the menu at the left side of the screen. The Application Status Page provides information regarding awarded grants. From this page, you can see whether or not a grant has been awarded and complete required follow-up forms for awarded grants. The term "follow-up" describes an upcoming or pending event such as a report that is due.

## **Submitting an Application:**

### **Do I have to complete the application in one sitting?**

No. Our online system will allow you to save and return to the application on an as needed basis. It is important to note however that a user will automatically be logged out of the system after 90 minutes of inactivity and AutoSaves are only conducted every 20 minutes, so you will need to be proactive about saving your work.

### **Are all fields on the application required?**

Most are. The fields requiring a response are marked with an asterisk. You will not be able to submit an application if all required fields are not addressed.

### **Can I print a copy of the application before I start?**

Yes, you can download and print a copy of the application questions. Once you have opened up a process to start (e.g. program/operating support) simply select the “Questions List” button in the top right corner.

### **Can I copy and paste information into the online application?**

Yes. If you prepare your application by copying and pasting, be sure to keep track of your character limits and as much as possible, try to use plain text (as opposed to HTML), to avoid formatting problems.

### **Are there size limits to my response to application questions?**

Yes. Character limits are enforced on all questions. The application will count characters (spaces and text) for you as you type, but it will not stop you from entering more than the character limit. When you reach the final submission stage the system will not accept your application until you reduce the size of any answers that exceed a required limit.

## **Uploading Files:**

In general, the **acceptable file types** for uploading files are: Microsoft Word, Microsoft Excel and Adobe PDF (PDF) files.

Generally speaking, only **one file can be uploaded per question**, so be prepared to combine certain documents into one file before uploading.

If the document(s) that need to be attached to your form are not electronic or you need to combine multiple documents into a single file, our online system gives you the option to **“Fax to File.”** The easy-to-use tool will convert documents from hard copy to digital format as a PDF file.

1. Click "Fax to File" in the menu at the left side of the screen and read the instructions.
2. Select "Request a Fax #"; a toll-free number will appear on the page.
3. Load a document, or multiple documents that need to be consolidated into one file, into your fax machine.
4. Dial the toll-free number. Send a separate fax for each individual file you wish to create.
5. Select "Finished Faxing" when you are done.
6. Remember to **click "Submit Form"** when you are finished.

If your **PDF upload file exceeds the maximum file size**, consider using the Adobe Acrobat option to 'Reduce File Size' (look at document options). If you are unable to reduce the size, contact Foundation staff ([nwynter@wacofoundation.org](mailto:nwynter@wacofoundation.org)) about submitting the required material in another format.

We recommend that you download copies of all **submitted forms** to your computer.

**Once your application has been submitted** it is no longer available for editing.

If you need to make a correction to a submitted form, contact Nicole Wynter at [nwynter@wacofoundation.org](mailto:nwynter@wacofoundation.org) or 254.754.3404.