Using the Updated HGF Grants Portal

Logging In

The HGF Grants Portal is accessed through this URL:

https://haroldgrinspoonfoundation.my.site.com/grants/s/login/

This link will send you to the log-in page.

Creating Account

If you are new to the grants portal, you will need to make an account.

Click "**New Applicant?**" under the Login pane. You will be prompted to enter your name, email address, a username, and a password. **Your username must be in the form of an email address.** Once you click "Sign Up," you will be redirected to the home page.

Resetting Password

If you already have an account but are unable to log in or you've forgotten your password, you can reset your password by clicking "**Forget your Password?**" under the Log In button. You will be prompted to enter your username to receive a link to reset your password. If your account was created for you as part of our launch, your username will be your email address.

In your email inbox, you will receive an automated email with a link and instructions to reset your account password**. If you don't see it, please try checking your spam folder**, as these emails are often mistakenly flagged as spam.

If you don't receive the link or you're still unable to access your account, please email grants@hgf.org or open a Support Case for help.
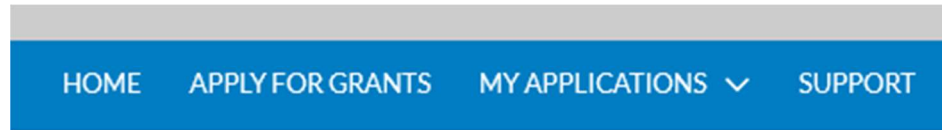
Home Page

The home page is where you can see a brief summary of information and tasks. There are three sections on the home page: Requirements, Payments, and Applications.

- **Applications** shows applications that are Unsubmitted, Pending, and Active. For information on these statuses, please see the applications section.
- **Upcoming Requirements** shows requirements (reports, agreements, or acknowledgements) that are due in the next year.
- **Submitted Requirements** are reports that have been completed and submitted, but not approved.
- **LOAs Outstanding Requirements** are Letters of Agreement that are past due.

- **Scheduled Payments** are payments for which all requirements have been completed. The Scheduled Date does not necessarily reflect the date on which you will receive the funds.
- **Unacknowledged Payments** are payments that have been paid, but the Acknowledgement requirement (confirming that the funds were received) has not been completed.

At the top of the page, you will see four tabs: **Home, Apply for Grants, My Applications, and Support**.

From the home page, you can also click your name in the top right corner to view your contact information ("My Profile") or log out. If you need to change your contact information, you can request that via the Support tab.

Apply for Grants

This tab is where you can begin applications for any available grant. Only grants you are eligible for will be visible to you. If you don't see a grant that you believe you are eligible for, please reach out to grants@hgf.org or submit a Support Case.

To begin an application, click **Apply Now** in the right-most column of the list.

Save and Finish Later

Once you've started an application, you can save your progress and finish the application at a later time. Please note that **not all applications will have this option.** If your application does have the option, you will see a checkbox at the top of the form.


To **save your progress**, check the box, then enter your email and a password. Please note that this login information is **separate from your portal login**. For ease of use, we recommend using the same email address and password that you use for the portal. Upon clicking **Save**, you will receive an email confirmation, with a link to resume your form.

To **resume a saved application**, you have two options. You can use the link sent to your email, which will prompt you to enter the login information you created. Alternatively, you can access the form again through the **Apply for Grants** tab of the portal, then click "Resume a previously saved form" at the top of the page. You will be prompted to enter the login information you created.

My Applications

The Applications tab is where you can see all information about your present and past grant applications. There are four subcategories of Applications: Unsubmitted, Pending, Active, and Closed.
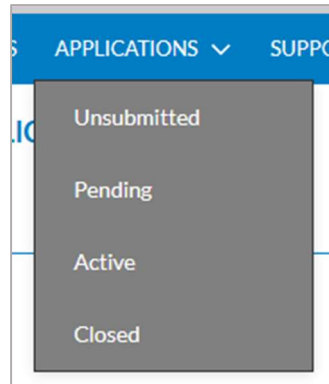
- **Unsubmitted** applications are applications that you have started and saved progress on, but not submitted. Please note that **this category is not currently functional**; to resume a saved form please see the Save and Finish Later section of this guide.
- **Pending** applications are applications that you have submitted which have not yet been approved or declined.
- **Active** applications are approved, ongoing grants.
- **Closed** applications are past, completed grants. Applications will be moved to the Closed category once all requirements have been completed, and disbursements have been paid. Please note that past applications from our previous portal may not be visible at this time.

Clicking a grant's name will take you to the **Grant Record**. Here, you can view and submit requirements, manage sharing access, upload files, and much more. These functions each have their own tab.

You can also click the **Create Support Case** button in the top right corner to contact us through Support.

Requirements

Under the **Requirements** tab is a list of all the past and currently due requirements, like reports, agreements, and acknowledgments. Requirements that were submitted before the transition to the new portal, as well as requirements due very far in the future, may not be visible. To access and submit a requirement, click **Start Report.**

Some forms may have the ability to save progress and complete them later. To do so, please see Save and Finish Later.

Please note that after submitting a form, it may take up to 10 minutes for its status in the portal to update to Submitted. You may also have to refresh the page. If, after that, the status is still Unsubmitted, please contact grants@hgf.org or submit a Support Case.

Application Responses

This tab displays a list of your responses to the questions on the grant application. Please note that applications submitted before our portal transition may not display properly.

Payments

The **Payments** tab displays all past and currently scheduled payments for the grant, along with its status. A status of **Contingent** means that a requirement must be completed first in order to receive that payment.

Please note that the amount displayed is representative of the **maximum** grant you are eligible for, and may not reflect the final payment amount. Additionally, the Scheduled Date is, by default, set to the final date the grant can be earned, and may not reflect the date that it is paid.

Files

The **Files** tab allows you to upload files of your choosing to the grant record. Uploading files here is not the same as submitting a report.

Application Access

This tab allows you to share access to your grant and its requirements with other users.

Adding a New Collaborator

To add access for a new collaborator, click **Add User**. You will need to enter their first name, last name, email address, and program role.

Please note that the program role has no effect on the user's access. It is for your reference only.

You can also choose whether they have **Edit** access or **View Only** access. Edit access will allow them to fill out and submit requirements on your behalf. View Only access will only allow them to see your grant record, but not change it.

Once you've filled out their information, click **Next**.

If the person you've added did not already have a user account in our portal, an account will be created for them. They will have to reset their password to log in.

Managing an Existing Collaborator

Once another user has been added to your grant record, you can manage their access or remove them, from the **Application Access** tab of the grant record. To do so, select the round button to the left of the user's name, then click **Edit Access**.

From here, you can use the drop-down menu to change the type of access the user has (**Edit** or **View Only**) or remove them entirely (**Remove Edit/View Access**).
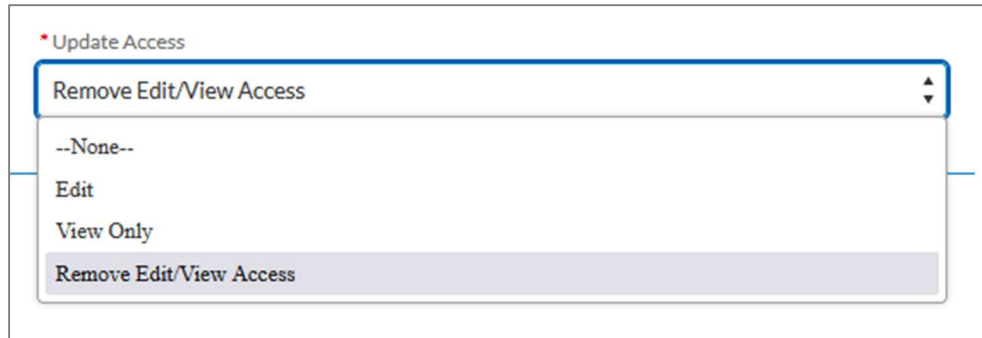
Transferring Ownership

If the person who submitted the grant application (the default **Primary Contact**) is no longer at your organization or able to submit their report, ownership of a grant or requirement can be transferred to a different account by our team.

You can contact us either via email at grants@hgf.org, or via the **Support** tab. Please be sure to include in your message the name of the grant, the current primary contact, and the name and email of the contact you'd like to transfer the grant to.

Please note that only the owner of a grant record can manage the sharing of that grant or add new collaborators.

More

Under **More**, there are two additional tabs: Tasks and Cases.

- **Tasks** will display any miscellaneous assigned activities related to the grant.
- **Cases** contains a list of all support cases you've opened relating to this grant.

Support

The **Support** tab allows you to view all your current and past support cases, as well as submit a new case. Use the **Open Cases** and **Closed Cases** tabs in the top left to navigate between the two categories.

To submit a case, fill out the required fields with the Subject and Description on the right side of the screen. You can also upload any relevant files, like screenshots, to help us resolve the issue.

Clicking a Case Number or Name will show you more details about that case. From the details page, you can also view or submit comments. Comments are a great way to communicate further information to us about the case. If our team has any questions about your issue, we may contact you either through the case comments or via email.