GrantVantage®

DDS Department of Developmental Services

Attachment A
DDS Applicant Instructions

Step-by-Step Applicant Guide

This document provides Applicants with a step-by-step guide to apply to a Funding Announcement, submit applications, and add new applicant delegates to their team.

A. Login or Register

1. If you have an existing applicant account, then **Login**.

Figure 1: Funder Portal Homepage Header

2. If your organization does not have an account with the GrantVantage Funder Portal, then **Register** your applicant organization and create the Primary Applicant user.
    a. **Note:** If your Applicant Organization exists, but you do not have an account reach out to the Primary Applicant so they can provide you with credentials.

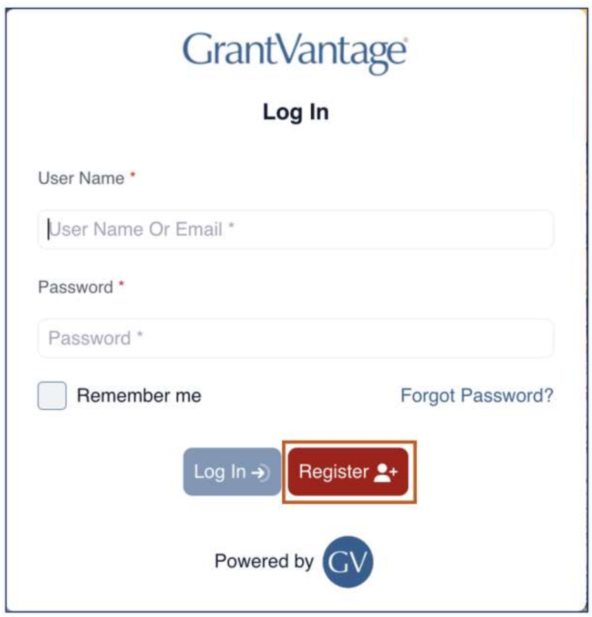

Figure 2: Login Screen

    b. **Note**: For more information about registering with the GrantVantage Funder Portal refer to the [Applicant Registration Zendesk Article].

B. Complete the Organization Profile

1. Select **My Applicant Profile** from the navigation menu.

2. **Update** the Applicant Organization Profile by entering necessary information in each tab: Add Organization Information, Physical & Mailing Addresses, Users, Contacts, and Documents.
    a. **Note**: For more information about updating the My Applicant Profile with the GrantVantage Funder Portal refer to the My Applicant Profile Zendesk Article.

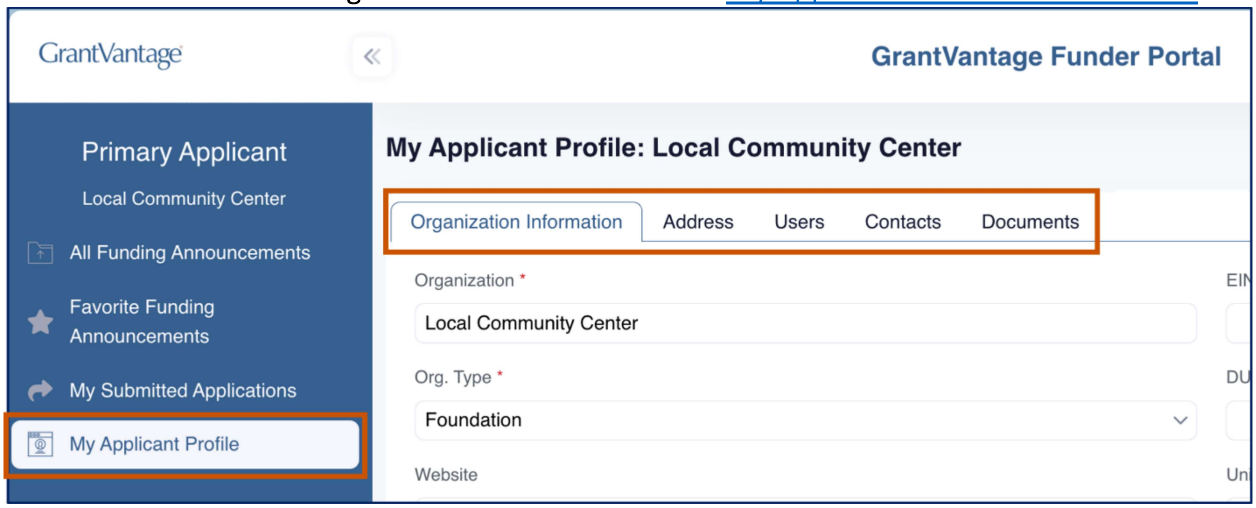

Figure 3: My Applicant Profile

3. Select the **Organization Information** tab.

4. Fill in the **required information** indicated with a red asterisk (*) and any other necessary information. Then, select **Save**.

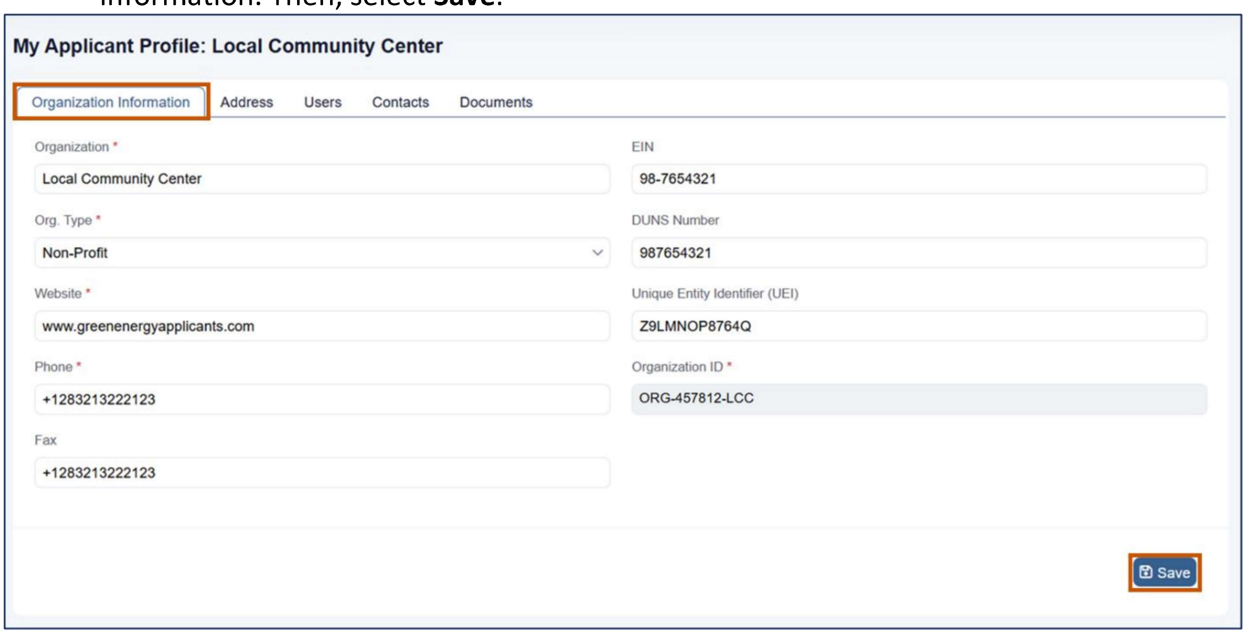

Figure 4: Organization Information Tab

5. Select the **Address** tab.

6. Fill in the **necessary information**, then select **Save**.
    a. **Optional:** Select the **Same As Mailing Address** checkbox if the physical address is the same as the mailing address.
        i. **Note:** If the physical address is different, enter the *correct details* in the appropriate fields.

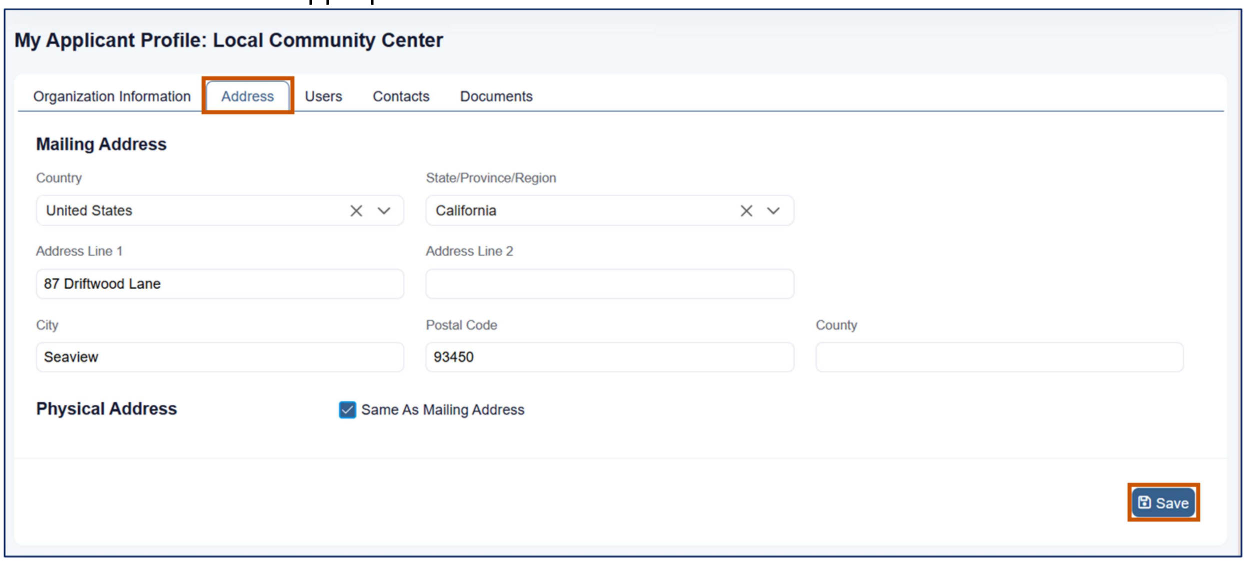

Figure 5: Address Tab

7. **Optional:** Add Applicant Delegate Users
    a. **Note:** Applicant Delegates are additional users who can login to the Applicant Organization and assist with completing applications. *Only Primary Applicants can add and assign applicant delegate users*
    b. Select the **Users** tab, then select **New**.

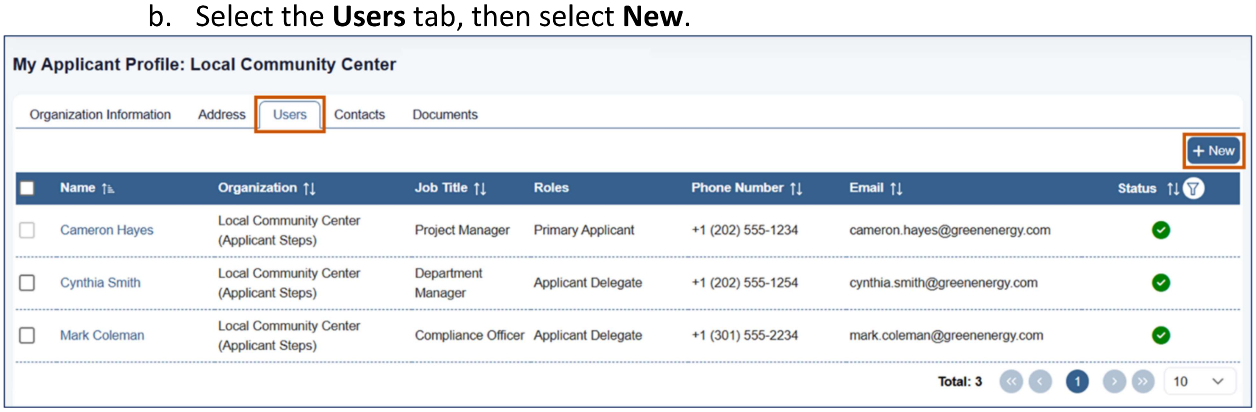

Figure 6: Users Tab

    c. Fill in the **required information** indicated with a red asterisk (*) and any other necessary information. Then, select **Save**.

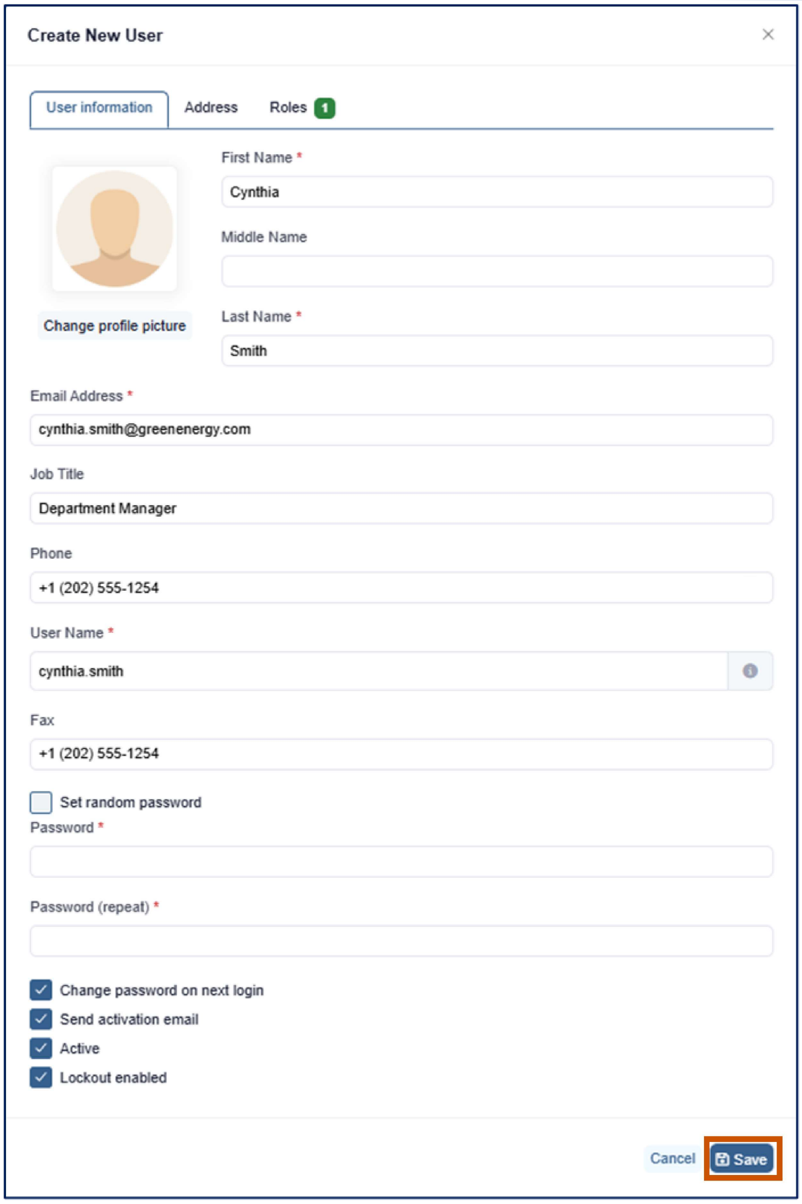

Figure 7: Create New User Dialog Box

8. **Optional:** Add Contacts
    a. **Note**: All Applicant User records will auto-create an associated Contact record.
    b. Select the **Contacts** tab, then select **New**.

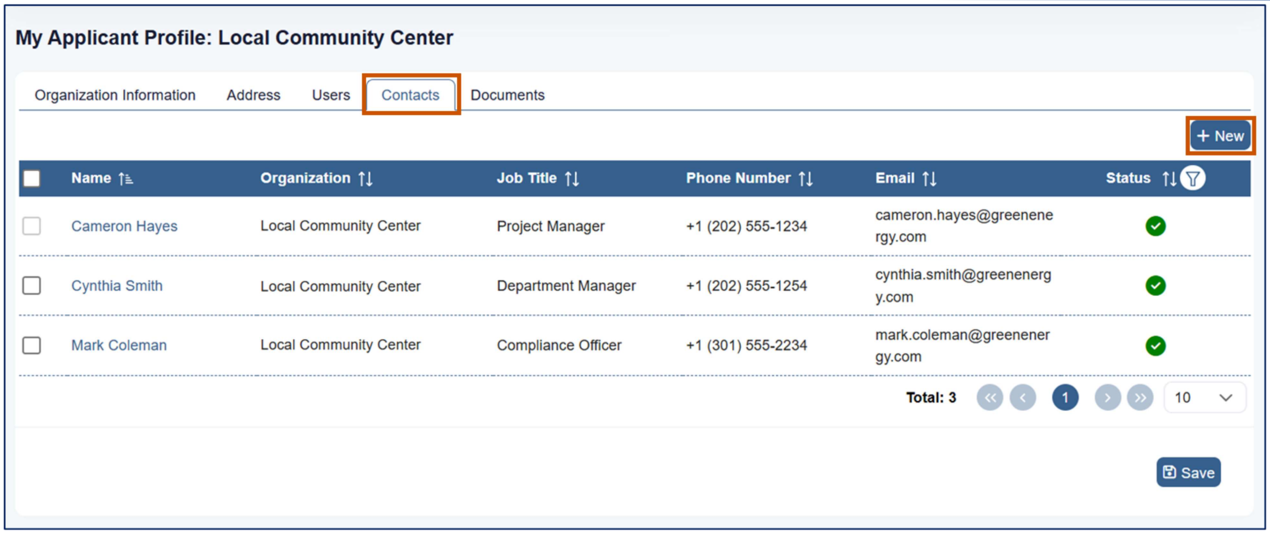

Figure 8: Contacts Tab

c. Fill in the **required information** indicated with a red asterisk (*) and any other necessary information. Then, select **Save**.

Figure 9: Create New Contact Dialog Box

9. **Optional:** Add Documents
   a. Select the **Documents** tab, then select **New**.

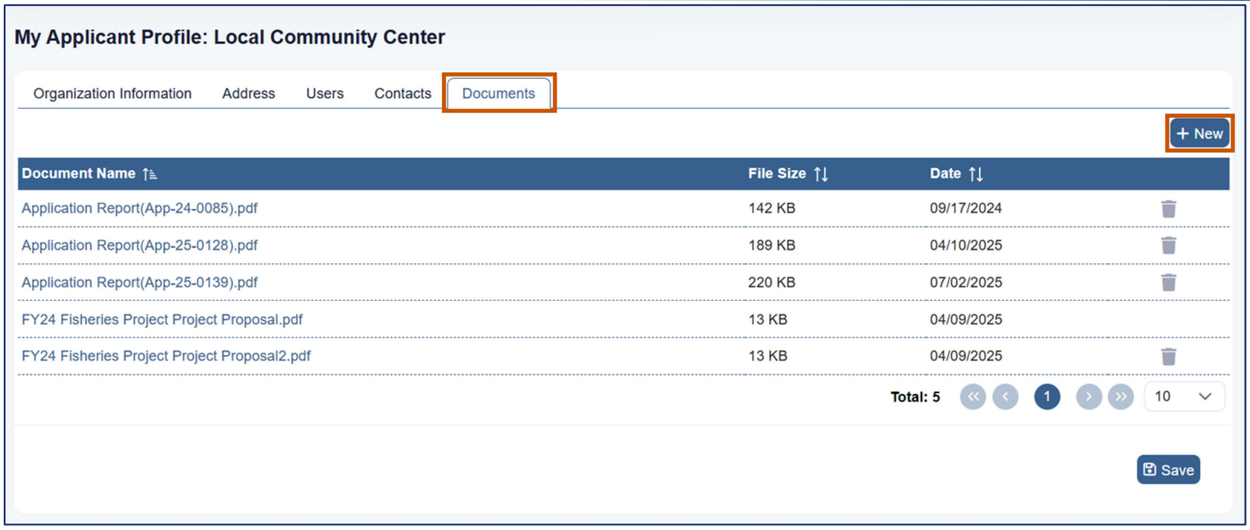

Figure 10: Documents Tab

b. Select **Browse.** *Browse and select the document from your local system, repeat as necessary*

Figure 11: Add Organization Documents Dialog Box - Browse

c. Once the relevant document is attached, select **Upload**.

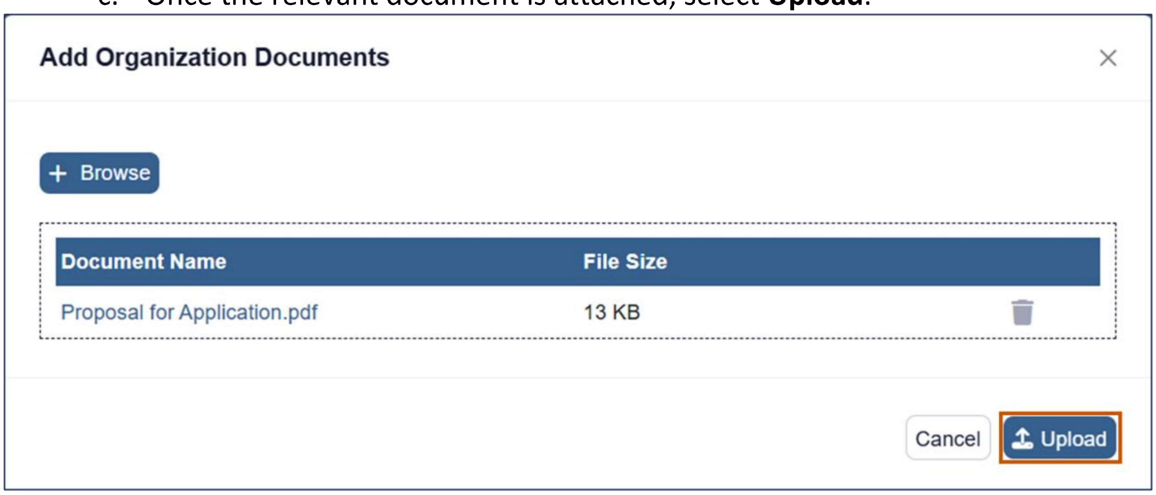

Figure 12: Add Organization Documents Dialog Box - Upload

C. Begin the Application

1. Select **All Funding Announcements** from the navigation menu.
    a. To view the Funding Announcement narrative, select the **Announcement Name**.
    b. To begin or resume an application, select **Apply**.

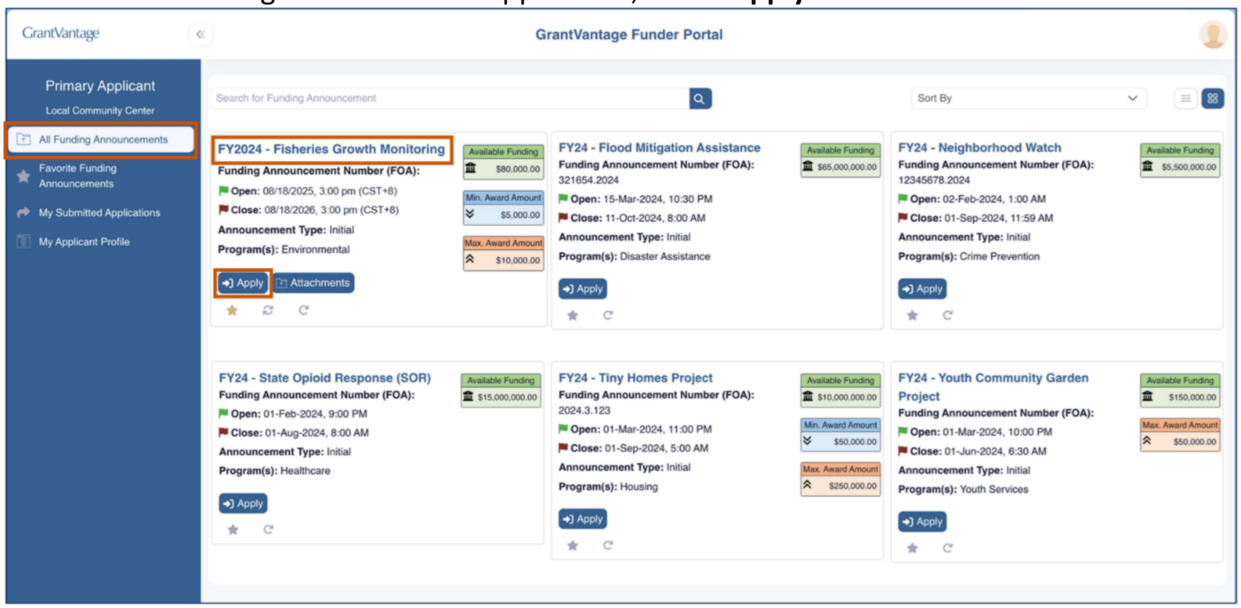

Figure 13: All Funding Announcements Gallery View

2. Select **Begin New Application** to create a new application or select *Resume* to open an existing one.

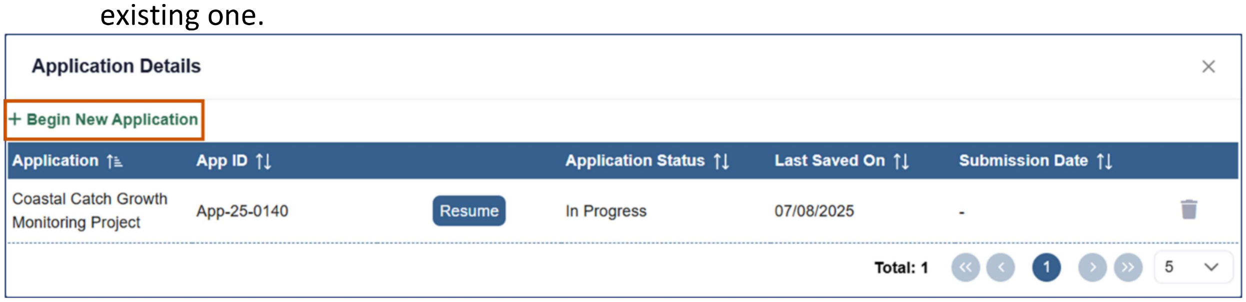

Figure 14: Application Details Dialog Box

3. Fill in the **Application Name**, then select **Save & Apply**.

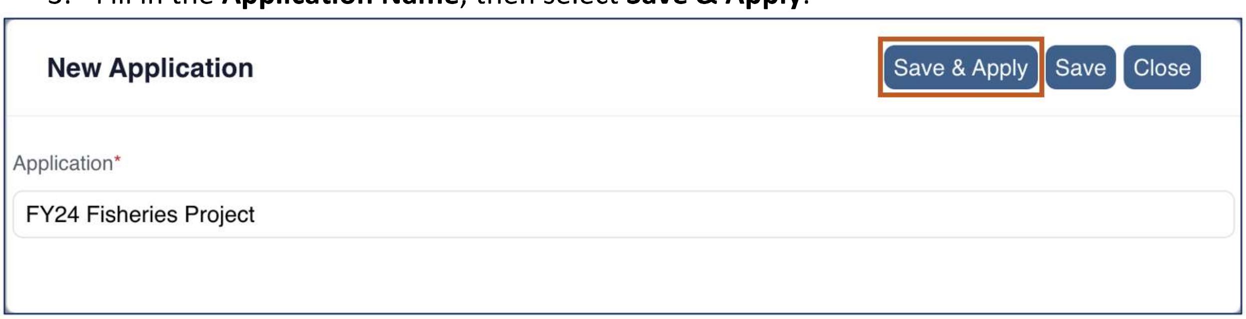

Figure 15: New Application Dialog Box

4. **Complete** all available application tabs.

a. **Note**: Application requirements are configured for each Funding Announcement. All applications will have the Summary and Questions tab. Additionally, some applications may also include the Project Plan tab and/or the Budget tab. All areas of the Application must be completed before the application can be submitted.

D. Complete the Application

In Completing the Application, always refer to the Funder Organization for more information about application requirements. Once each tab—Summary, Questions, Project Plan, or Budget—is completed, the status icon will display a green checkmark.

i. Summary

The Summary section includes the name of the application, the requested amount, and the project summary. If the application does *not* include the Budget tab, applicants will enter their requested amount on this page. Otherwise, this field will auto-populate with the Budget Direct Total.

1. Fill in the **required information** indicated with a red asterisk (*) and any other necessary information, then select **Save**.

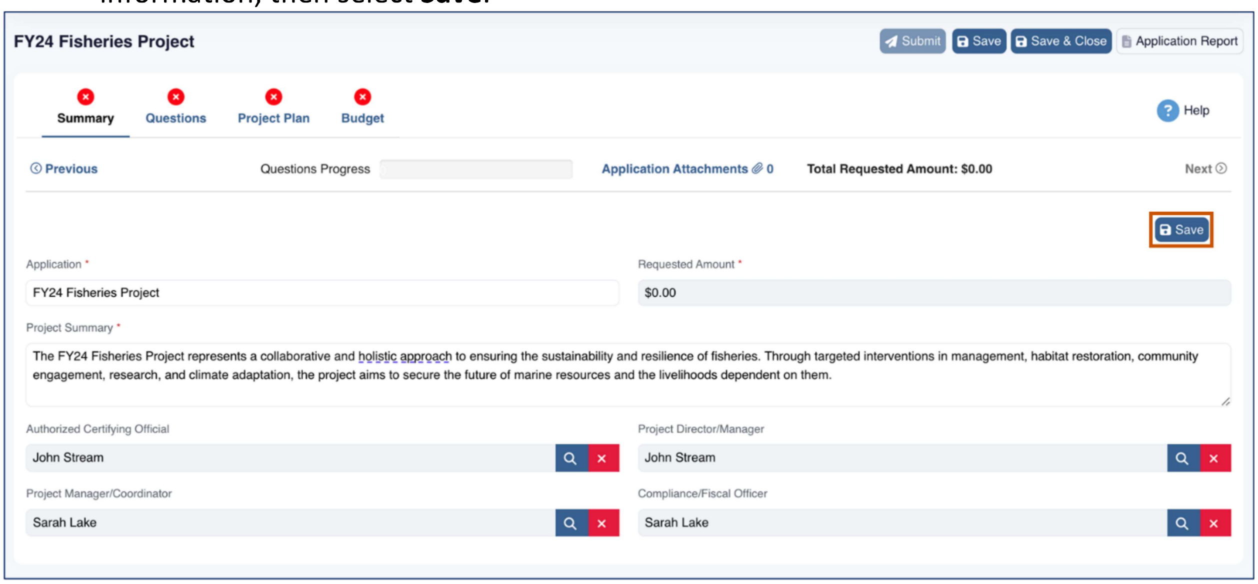

Figure 16: Summary Tab

ii. Questions

The Questions section includes all applicant questions required to submit the application. Once all Questions are answered, the Question tab icon will display a green checkmark and Question Progress will be 100%.

For more information about how to answer each Question Types during application to a funding announcement, refer to the [How to Answer each Question Types Zendesk Article](#).

1. **Answer** all Questions.
    a. Navigate questions by selecting **Next**, **Previous**, or a specific **Question Name**.
    b. Select **Question Instruction** to view any additional question instructions.
    c. **Note**: Select **Save** every time you answer a question.

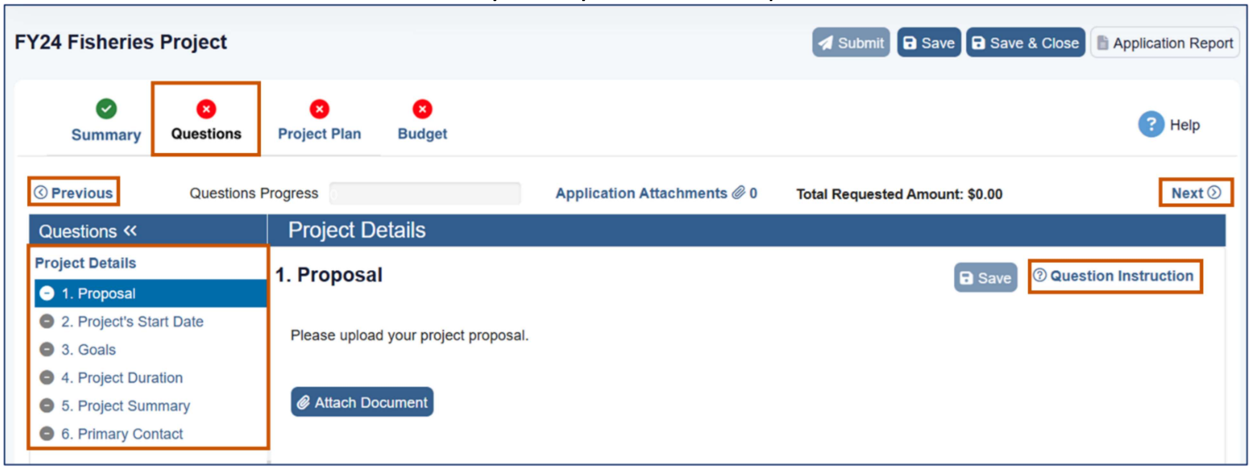

Figure 17: Funding Announcement Question Tab

2. **Optional:** Additional Attachments

Some questions may allow additional attachments to be added to the question answer. These attachments are optional and do not fulfill the question requirements on their own. This means that even if you upload an attachment, you must still fully answer the question.

   a. Select **Attach Document**.
      i. **Note:** Some questions require an attachment or additional documentation to complete the response field.

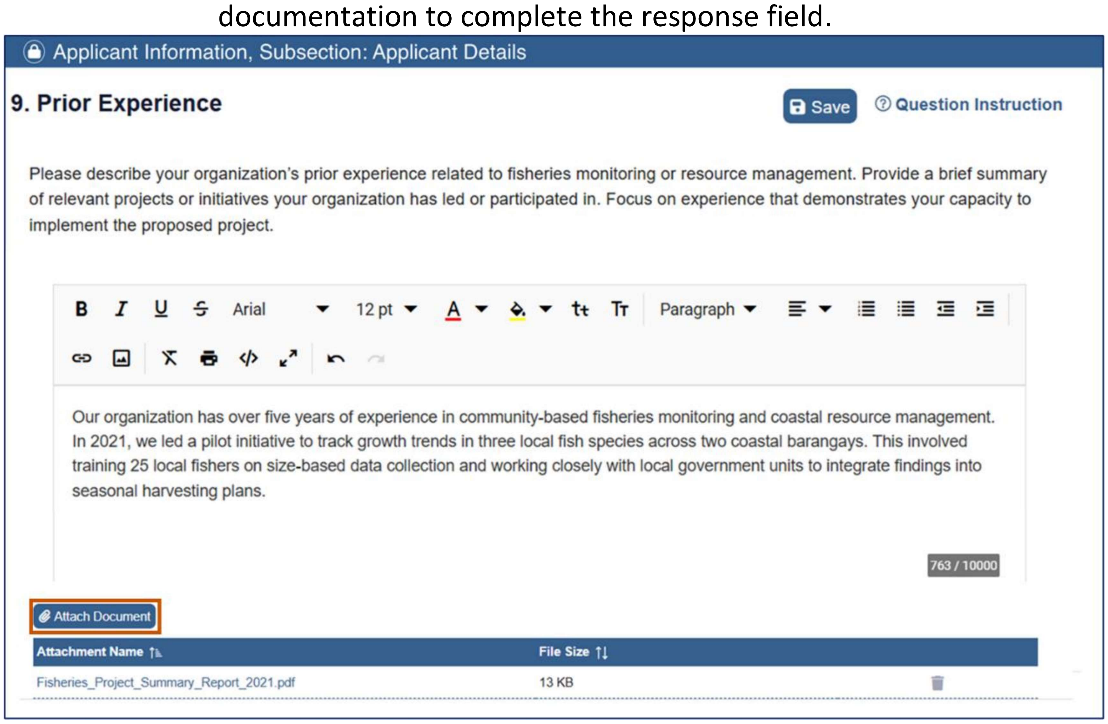

Figure 18:Additional Attachments

   b. **Optional:** Document Library

i. Select the document **checkboxes**, as necessary. Then, select **Save**.

1. **Note**: The Documents dialog box displays all documents in the My Applicant Profile Document library. If the document is not available in the library, then it can be uploaded at this time.

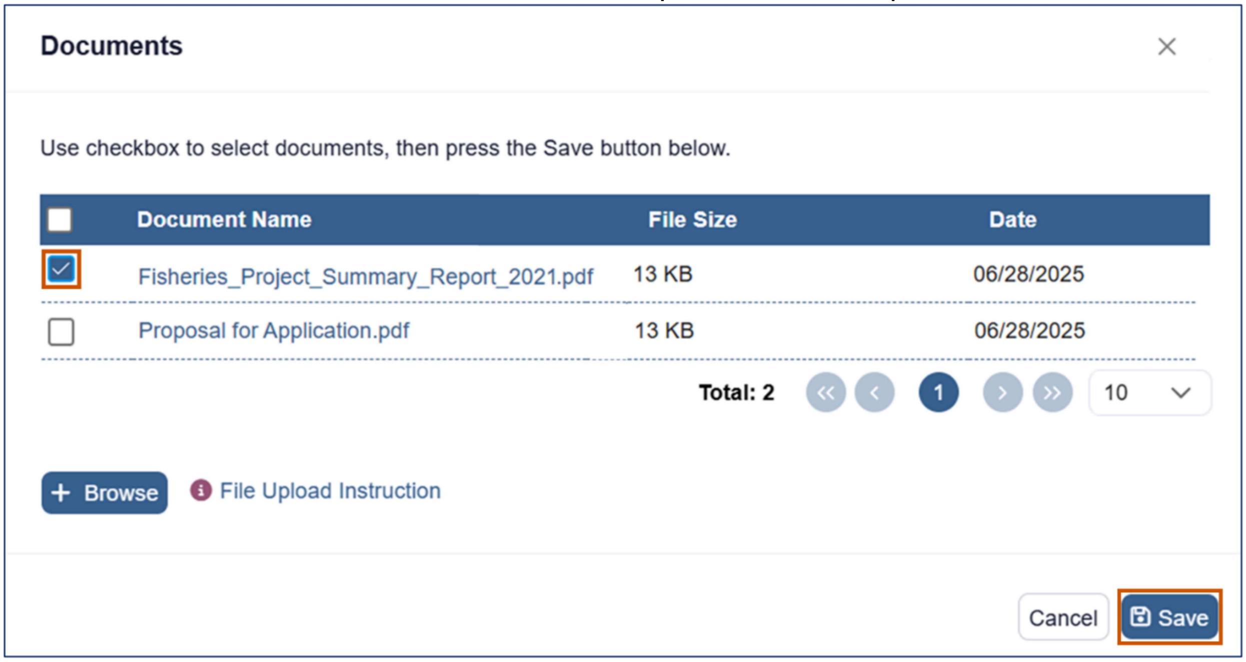

Figure 19: Documents Dialog Box – Select Checkbox

c. **Optional**: Upload New Document

i. Select **Browse** to search for the document.

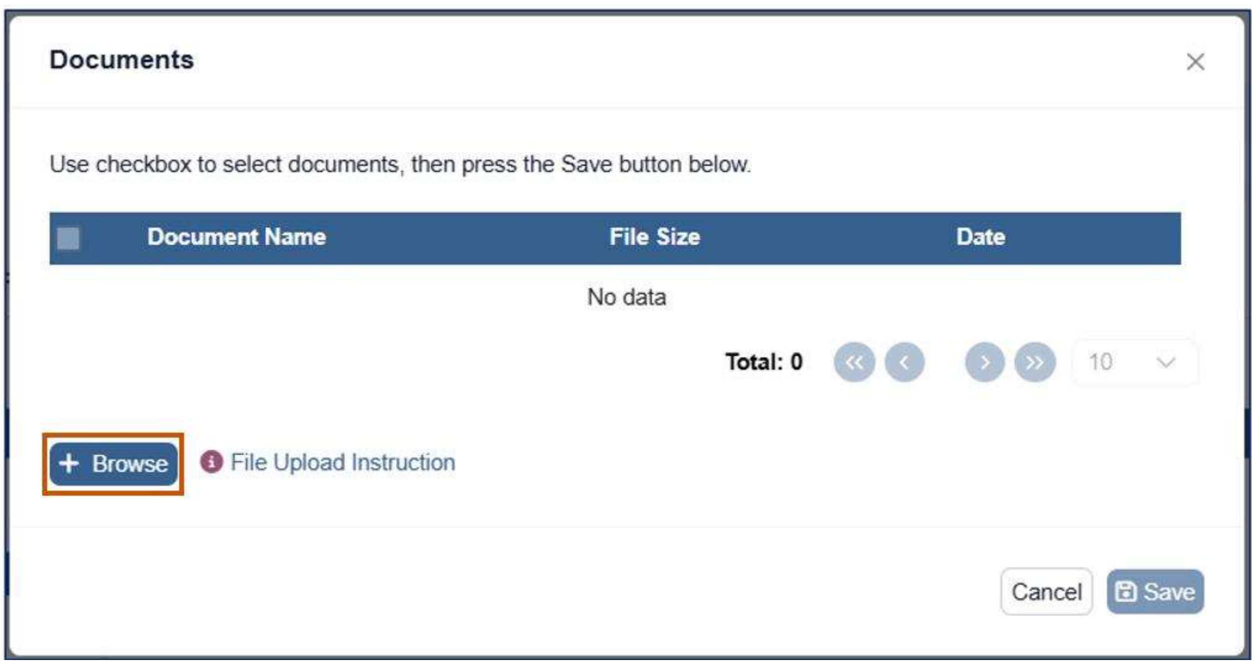

Figure 20: Documents Dialog Box - Browse

ii. Select the **Document** from your local files.

iii. If the document is Confidential, then select the **Confidential** checkbox. This option may not be available to all applicants.

iv. Select **Upload**.

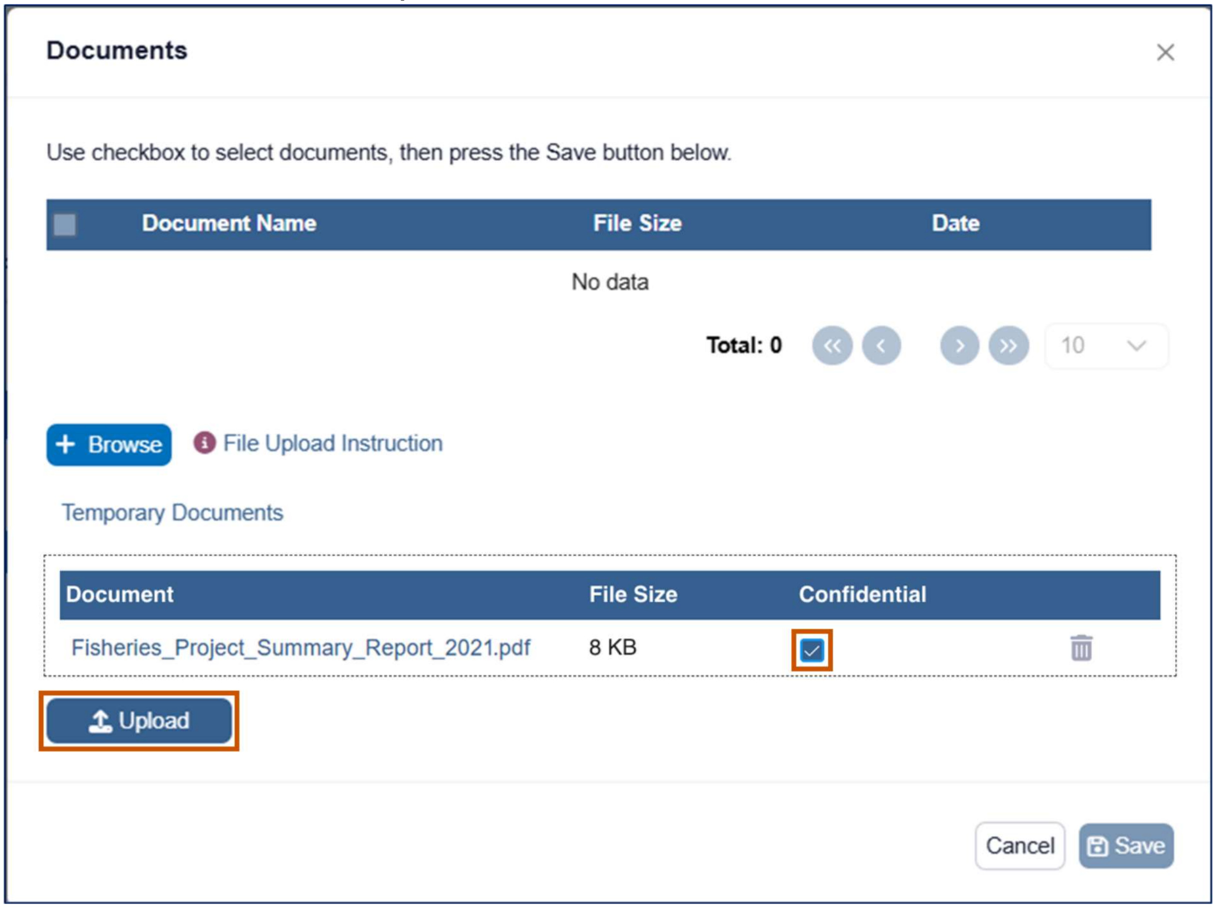

Figure 21: Documents Dialog Box - Upload

v. Once the document is in the library, select the **document** checkbox. Then, select **Save**.

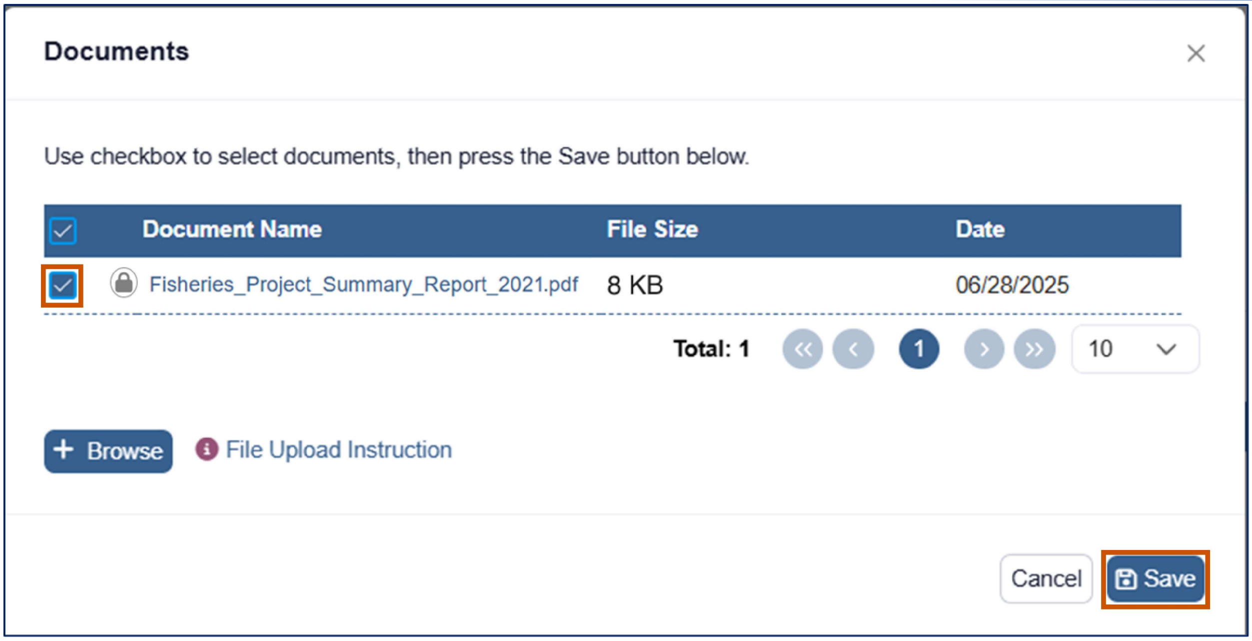

Figure 22: Documents Dialog Box

d. Once you've completed the question, **select Save**.

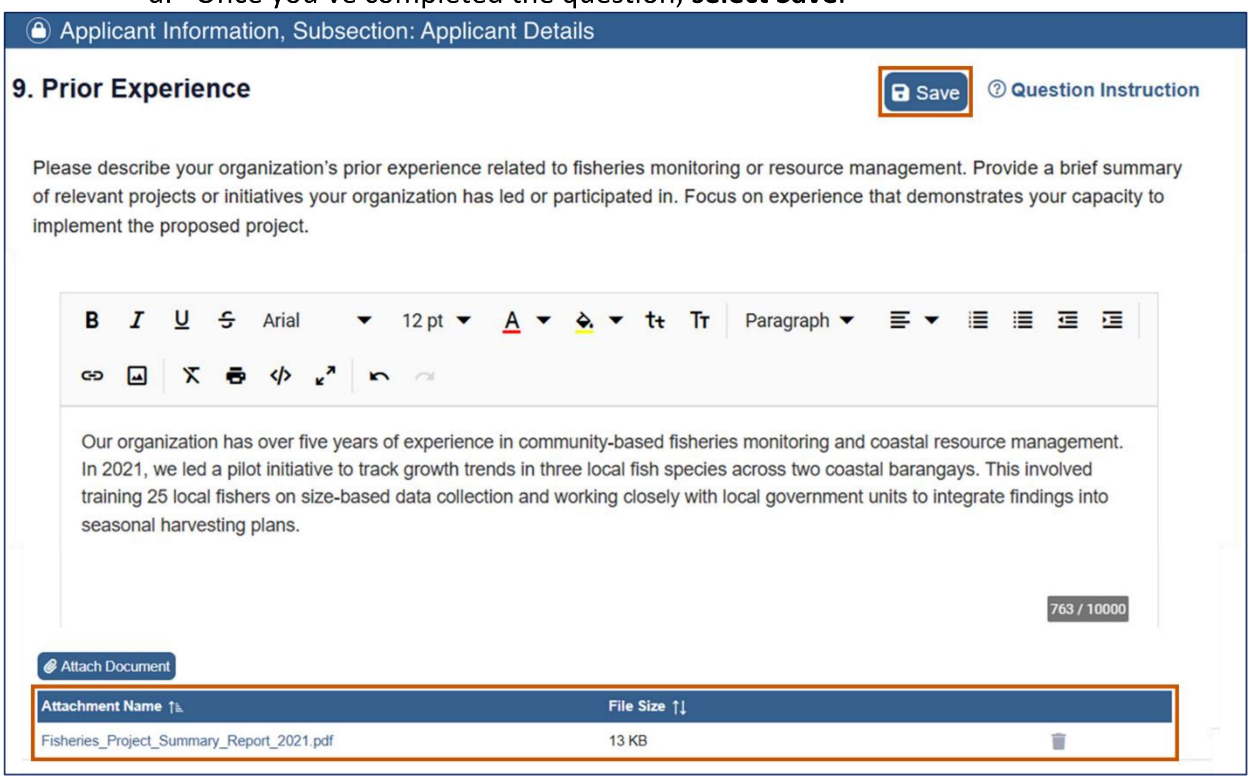

Figure 23: Additional Attachments

iii. Project Plan

The Project Plan may or may not be configured based on the Funding Announcement. If the Project Plan is configured, it is a required component of the application. Once the Project Plan is complete, the Project Plan tab icon will display a green checkmark.

For more information about how to complete the Project Plan during application to a funding announcement, refer to the How to Complete the Project Plan Zendesk Article.

1. Select the **Project Plan** tab.

2. Select **Project Plan Instructions**.

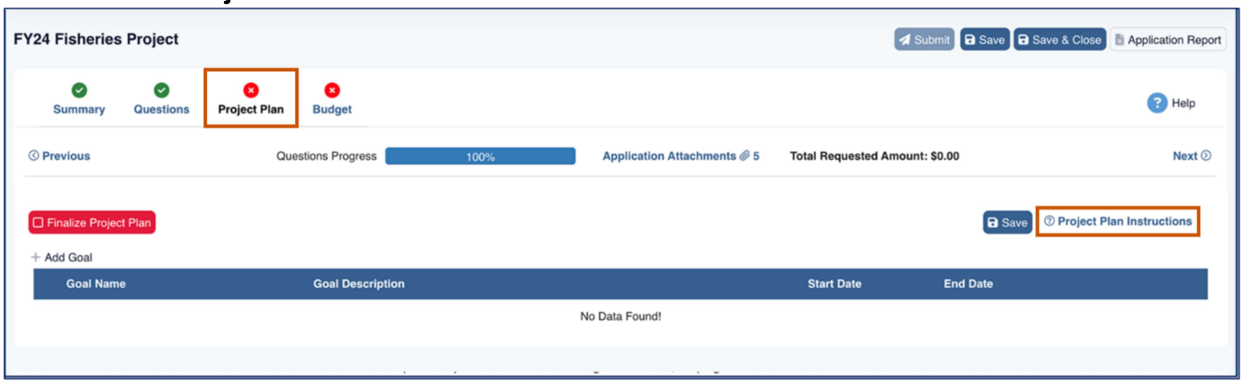

Figure 24: Project Plan Instructions

3. **Optional**: Add Goals, Objectives, Performance Measures, and Activities
   a. **Note**: Applicants may or may not be allowed to add new Goals, Objectives, Performance Measures, or Activities.
   b. Select **Add Goal** to add a new Goal.
      i. **Note:** Goals may or may not be configured based on the Funding Announcement.
   c. Select **Add Objective** to add a new Objective.
   d. Select **Add Measure** to add a new Measure.
   e. Select **Add Activity** to add a new Activity.

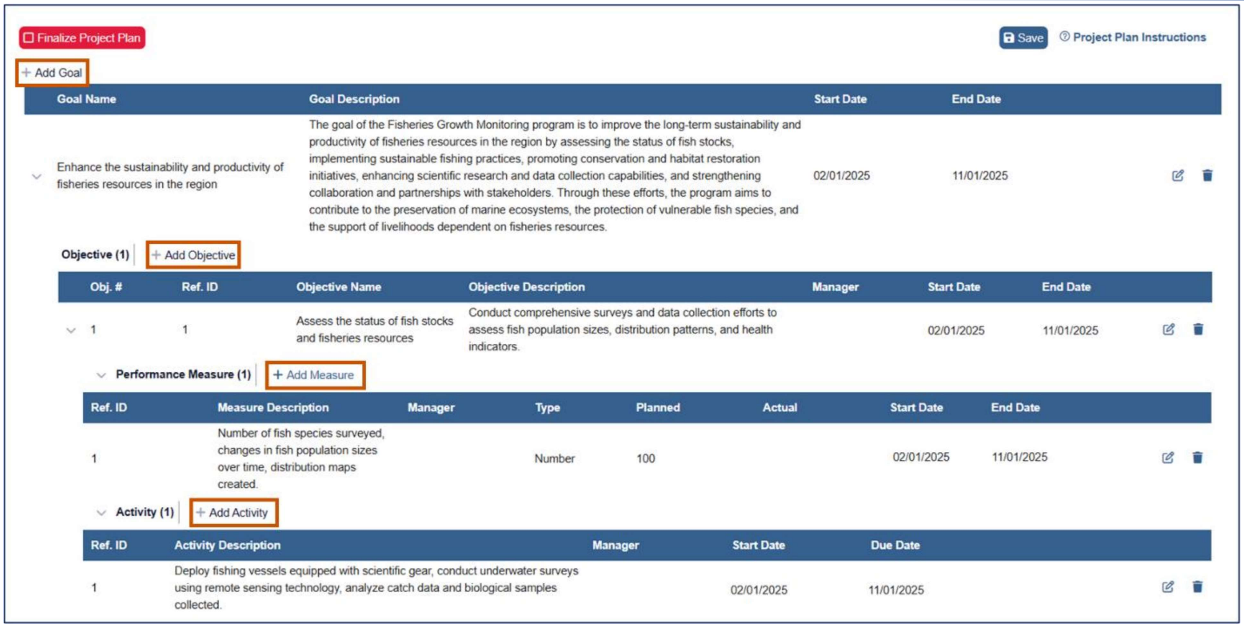

Figure 25: Add Goals, Objectives, Performance Measures, and Activities

4. **Optional**: Edit Goals, Objectives, Performance Measures, and Activities
    a. **Note**: Applicants may or may not be allowed to edit Goals, Objectives, Performance Measures, or Activities. This may result in locked fields within the dialog boxes.
    b. Select the **Edit** button to modify Goals, Objectives, Performance Measures, and Activities. Once your changes are made, select **Save**.

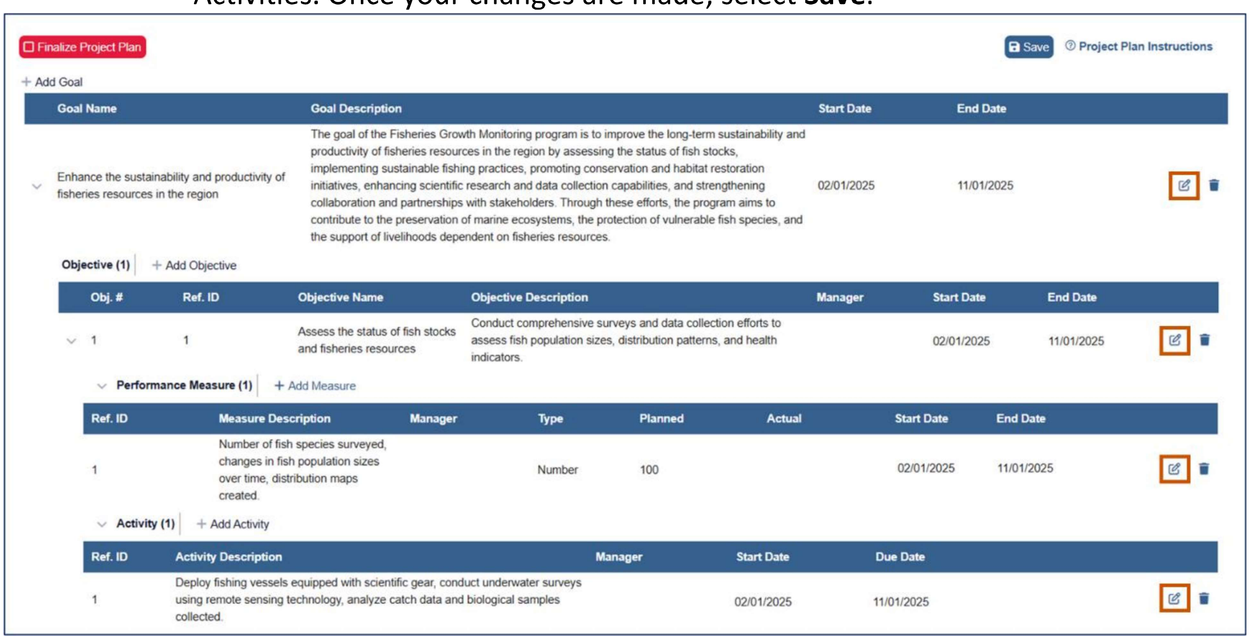

Figure 26: Edit Goals, Objectives, Performance Measures, and Activities

5. Select **Finalize Project Plan**.

a. **Note**: This will save and lock the Project Plan. Once Finalize has been selected, the Project Plan tab icon will display a green checkmark.

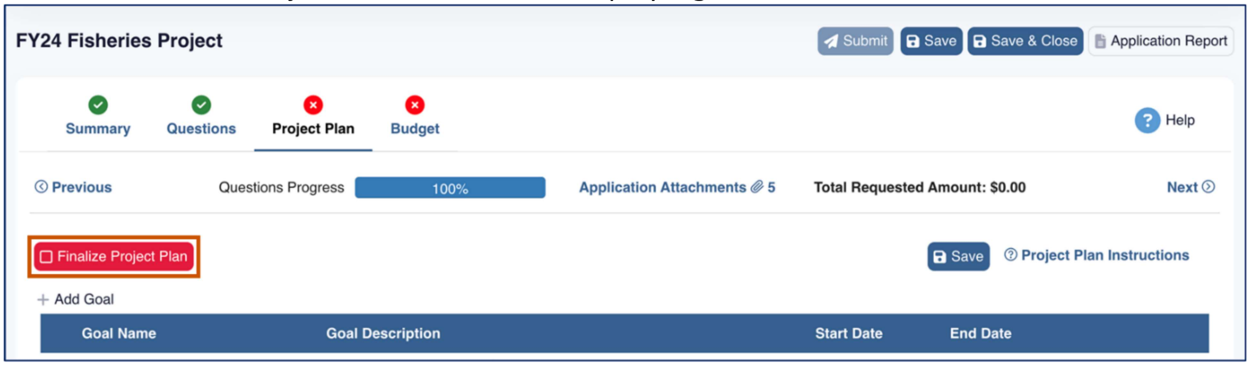

Figure 27: Finalize Project Plan

6. **Optional:** Unlock the Project Plan for editing
   a. Select **Return to Draft**. Once all changes are made, select **Finalize Project Plan**.

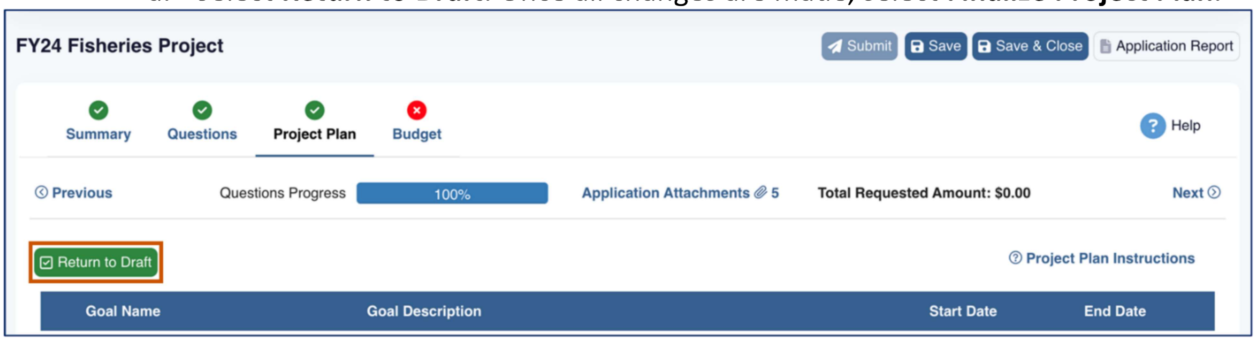

Figure 28: Return to Draft

iv. Budget

The Budget may or may not be configured based on the Funding Announcement. If the Budget is configured, it is a required component of the application. Once the Budget is complete, the Budget tab icon will display a green checkmark. Budgets may require applicants to complete Budget Calculations or Budget Narratives.

For more information about how to complete a Budget during application to a funding announcement, refer to the How to Complete the Budget Zendesk Article.

1. Select the **Budget** tab.

2. Select **Budget Instructions**.

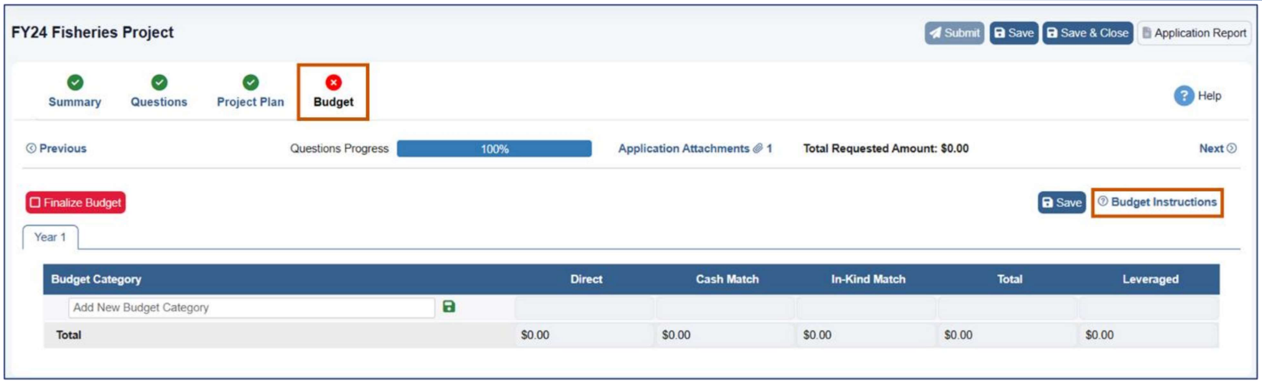

Figure 29: Budget Instructions

3. Fill in the **Direct**, **Cash Match**, **In-Kind**, and **Leveraged** columns as needed.
    a. **Enter** the budget values, then select **Save**.
        i. **Note**: Some Budget Categories may require the completion of the Budget Calculation form and disallow entering a value on the budget.

Figure 30: Budget – Allowed Entries

    b. Select the **Calculator** button next to the budget category name. **Complete** the Budget Calculation form, then select **Save** on the dialog box.
        i. **Note**: If a Budget Narrative is required, the field will be visible on the Budget Calculation form.

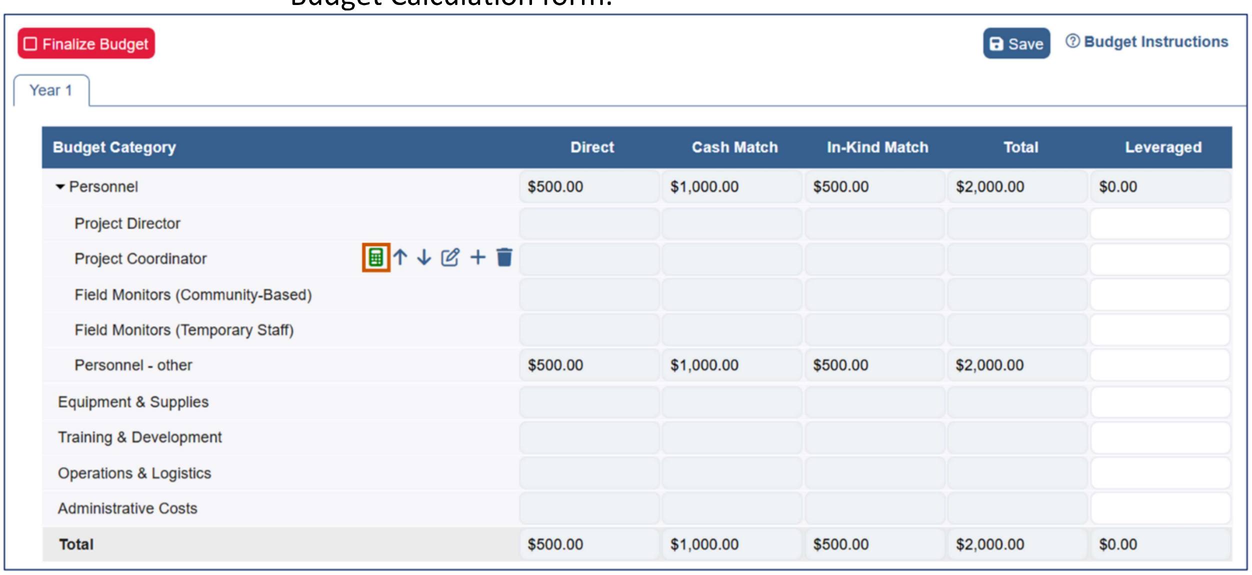

Figure 31: Budget – Disallowed Entries

c. **Complete** the Budget Calculation form, then select **Save** on the dialog box.

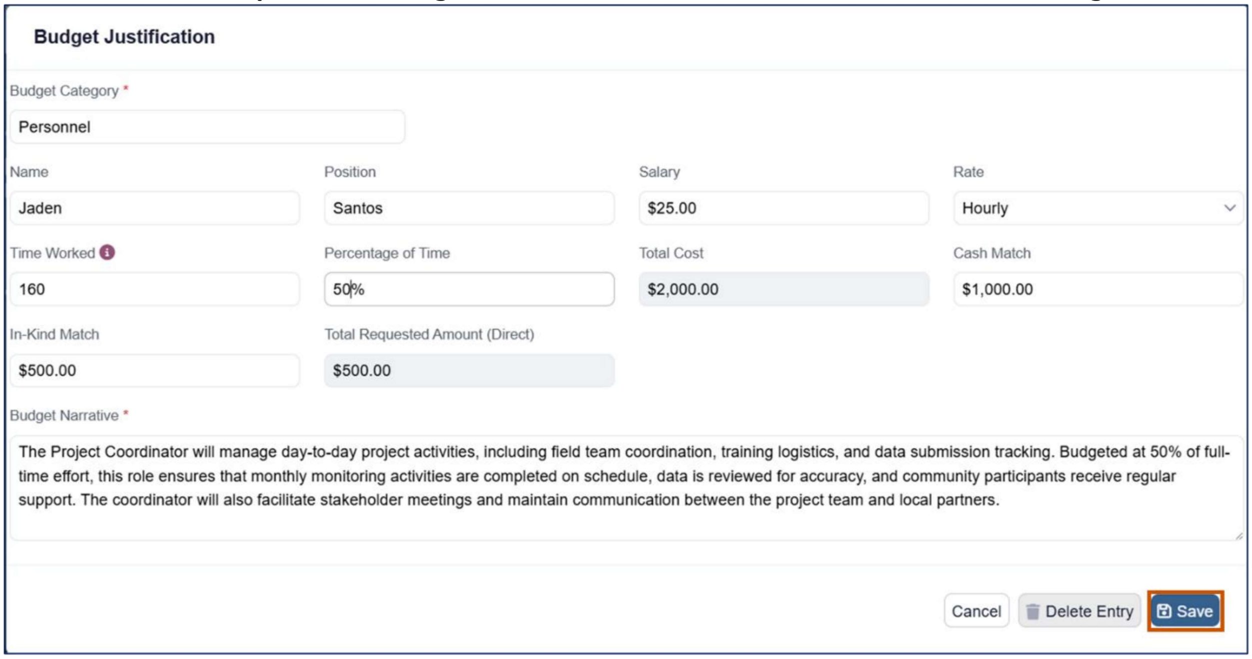

Figure 32: Budget Calculation Form

4. **Optional:** Parent & Sub-Categories
    a. **Note:** Applicants may or may not be allowed to create, edit, and delete Parent Category & Sub-Categories.
    b. **Add Parent & Sub-Categories**
        i. Hover over the **Budget Category**, then select the **Plus** button.
        ii. Select **New Parent Category** to add a new parent budget category. Select **New Sub-Category** to add a new sub-category to a parent budget category.

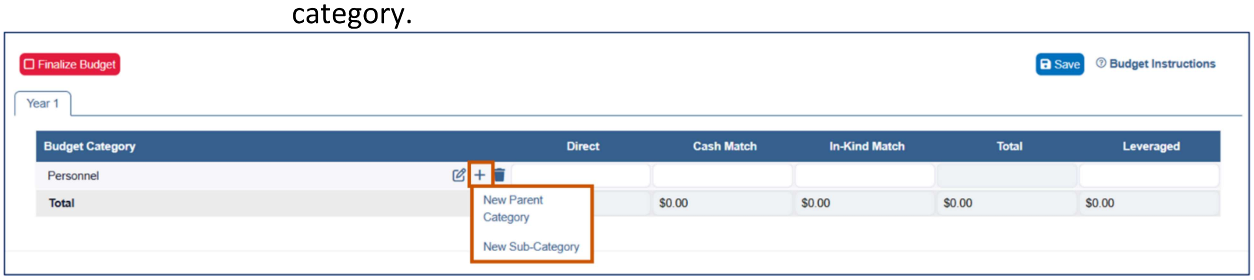

Figure 33: Parent Category and Sub-Categories

        iii. Fill in the **Parent Budget Category Name**.
        iv. Select **Save next to the Budget Category name**.

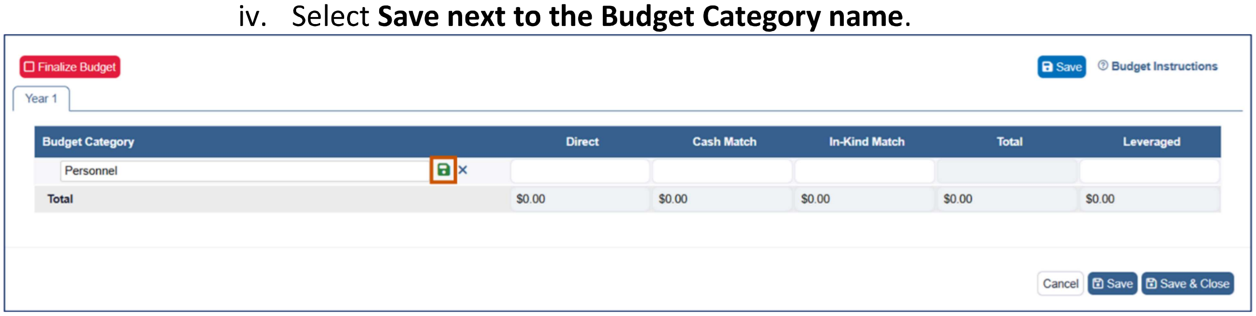

Figure 34: New Parent Category

v. Fill in the **Sub-Budget Category Name**.

vi. Select **Save next to the Budget Category name**.

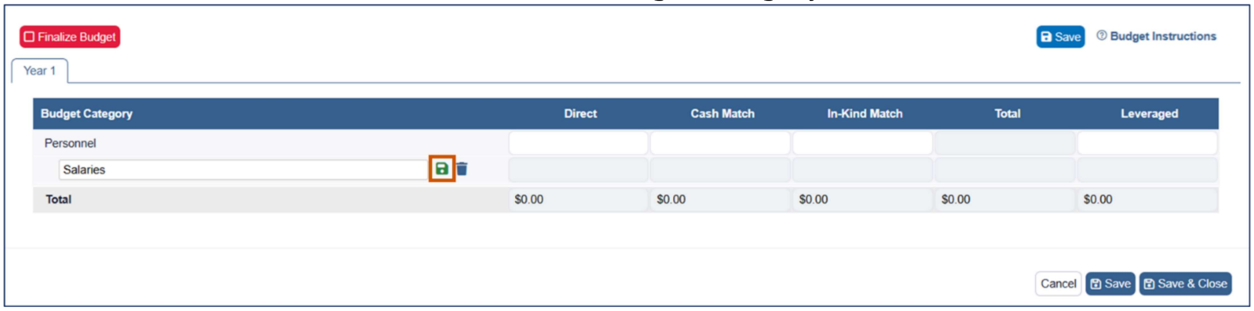

Figure 35: New Sub-Category

5. **Optional:** Budget Narrative
    a. **Note**: The Budget Narrative is configured based on the Funding Announcement. Narratives are entered into as a single budget narrative or by Budget Category.
    b. Single Budget Narrative: Enter the Narrative in the **Budget Narrative** textbox. Then, select **Save**.

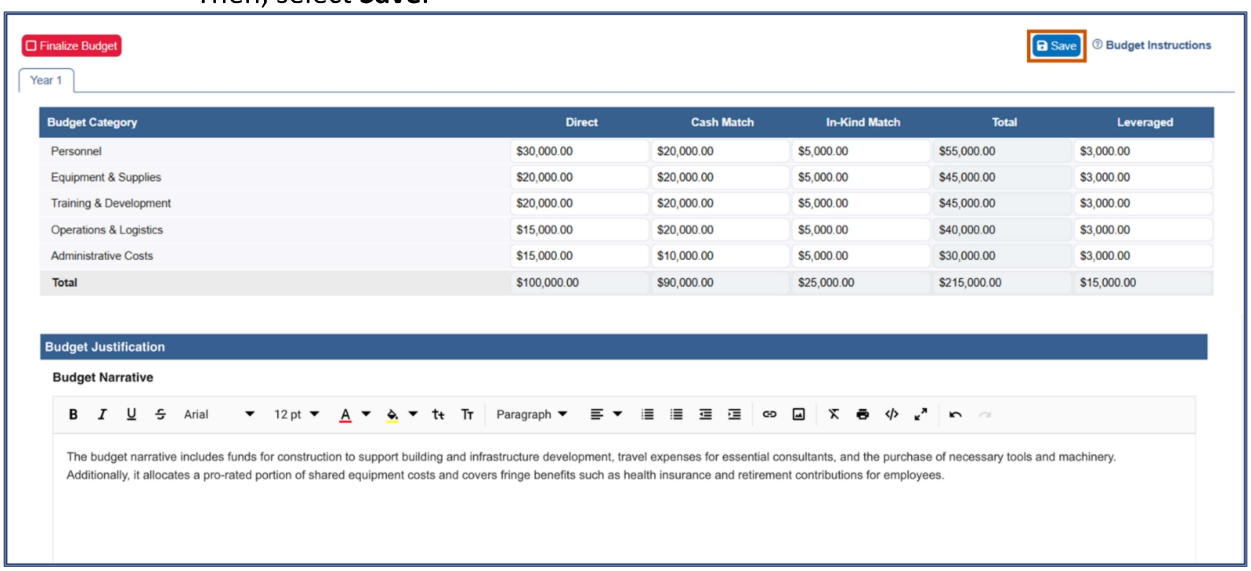

Figure 36: Budget Narrative

6. Select **Finalize Budget**.
    a. **Note**: This will save and lock the Budget. Once Finalize has been selected the Budget tab status will display a green checkmark.

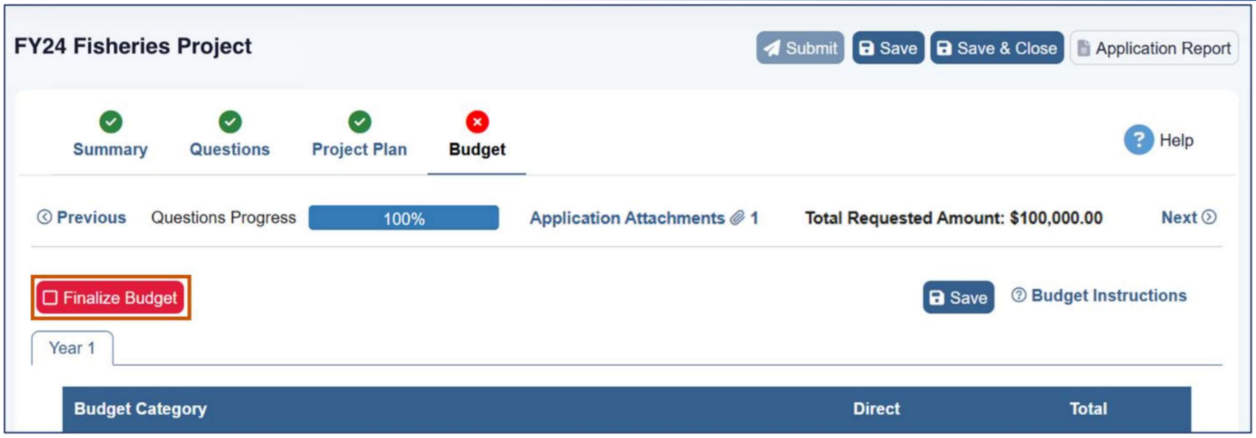

Figure 37: Finalize Budget

7. **Optional**: Unlock the Budget for editing
    a. Select **Return to Draft**. Once all changes are made, select **Finalize Budget**.

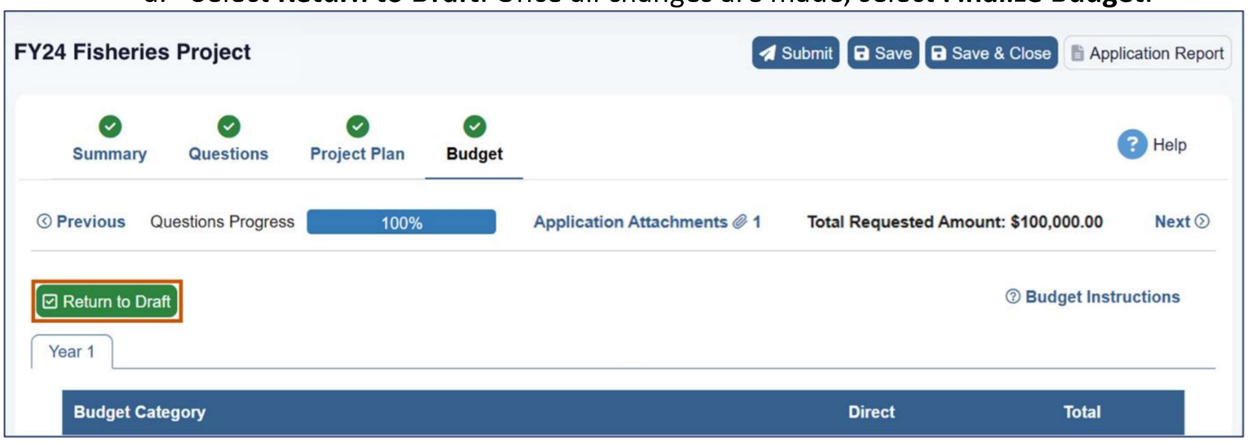

Figure 38: Return Budget to Draft

E. Submit the Application

Applications can only be submitted once all tabs are complete and have a green checkmark.

1. Select **Submit**.

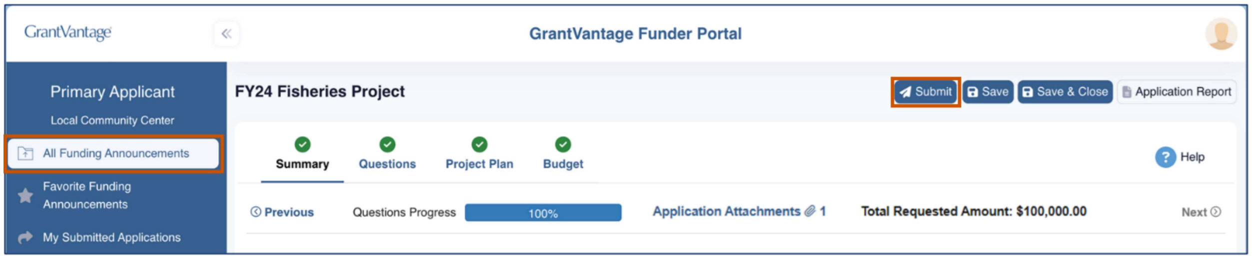

Figure 39: Submit Application

   a. **Note**: Once an application has been submitted it will be available in My Submitted Applications. Select the **Application Report** button to view the PDF application.

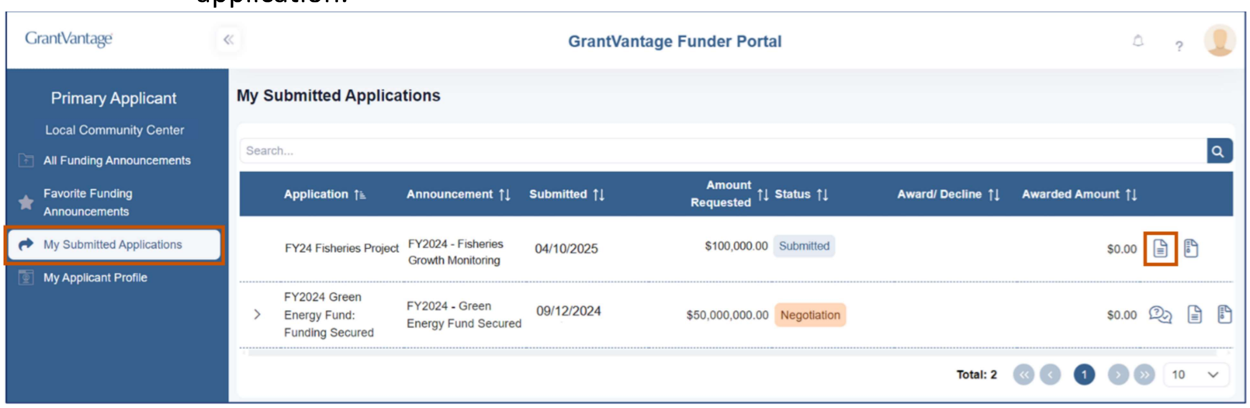

Figure 40: Application Report