Harold Grinspoon FOUNDATION | Harold Grinspoon CHARITABLE FOUNDATION

PJ Library® PJ OUR WAY. Jcamp180. From STRENGTH to STRENGTH Life & Legacy Voices & Visions® LOCAL FARMER AWARDS EXCELLENCE IN TEACHING Awards

Using the New HGF Grants Portal

Welcome to the New HGF Grants Portal! This document will guide you through establishing an account, submitting applications and reports, managing access, and how to get help.

Logging In

The HGF Grants Portal is accessed through this URL:
https://haroldgrinspoonfoundation.my.site.com/grants/s/login/

Please bookmark and save the link. If you already have an account and you've logged in recently, you may be automatically logged in and sent to the home page. If not, accessing this link will send you to the log-in page.

Creating Account- New Applicants

If you have never applied for HGF grants before you will need to create an account. Click the "**New Applicant?**" button under the E-mail field. You will be prompted to enter your name, email address, a username, and create 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. Please save your username and password in a secure location.

Creating Account- Returning Applicants

If you have used the HGF legacy portal in the past, an email message was sent to you in late August or early September assigning you a username and link to reset password. This message was sent from Grants@hgf.org with the subject "Welcome to the HGF Grants Portal - Action Needed." If you haven't already created a new account for the new portal, please do so.

Log in Problems- Resetting Password

If you already established an account with the new portal but are unable to log in or you've forgotten your password, you can reset your password by clicking the "**Forget your password?**" button under the Password field. You will be prompted to enter your username to receive a temporary password.

In your email inbox, you will receive an automated email with a temporary password 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 temporary password or you're still unable to access your account, please email grants@hgf.org for support.

Navigating the New Portal

My Profile/Home page

The My Profile/Home page is where you can easily access upcoming requirements, scheduled payments, pending applications and customer support. Near the top of the page, you will see this banner:
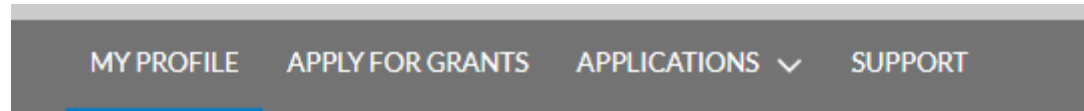
Apply for a New Grant

Click on "Apply for Grants" to display a list of grants for which you may be eligible to apply. 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.

Click on the "Apply Now" hyperlink in the far-right column to access a new application. These links will allow you to submit a new application or resume an in-progress application.



Save and Resume an Application or Report

Many applications and reports allow you to save and resume. If you would like to save an in-progress form and return to it later, select the checkbox next to "Save my progress and resume later." You will be prompted to enter an email address and 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. Please save this information as it will be needed to access the form. A confirmation message will be sent to the email message you entered with a link to access your in-progress form. Please save and flag this message.

Israel Travel Grant Application

Page: 1 2

☐ Save my progress and resume later | Resume a previously saved form

Alternatively, you can access an in -progress form 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.

Applications

From the applications tab, you can see all your applications that are Pending, Active, and Closed. **To switch between the categories, use the drop-down menu under "Applications."**
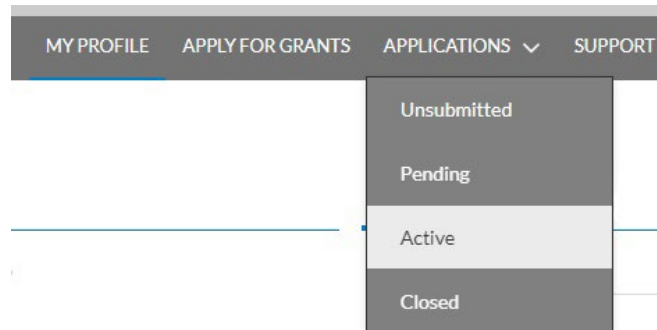
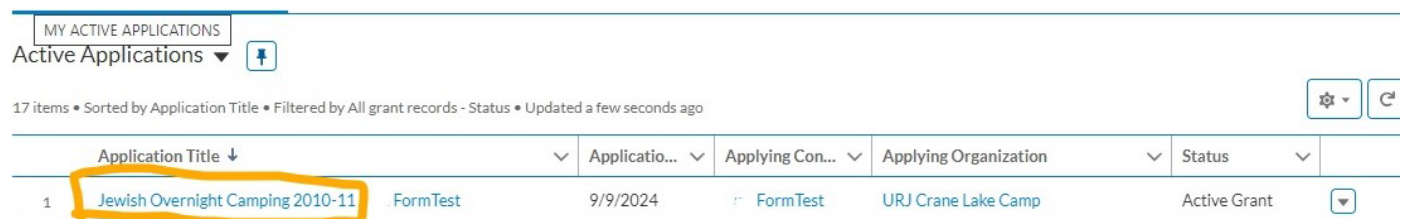**Pending** grants have been submitted and are under review.

Active Grants are approved grants. There grants often have requirements that must be approved before a payment is issued.

Closed Grants have been paid, declined, or withdrawn. Please note that past applications from the previous portal may not be visible in the current one.

Unsubmitted refers to in-progress forms. This tab will soon allow you to resume an in-progress application, but this feature is not functional yet. Please refer to the "Save and Resume an Application or Report" section of this document.

Managing Applications

Clicking on the **Unsubmitted**, **Pending**, and **Active** tabs will take you to the grants in those categories. To open an active application, click on the **Application Title**.

Clicking on the **Application Title** will take you to the Grant Details page where you can review the status, award amount, and other information. There are additional tabs to view and manage **Requirements, Application Responses, Payments, Files, and Application Access**.

Requirements

You can access requirements such as reports, letters of agreement, payment acknowledgements, and banking information from the **Grant Details** page found in **My Active Applications**. Click on **Requirements,** then the **Requirement Title** to submit a report or to check on the status of a submitted report.

GRANT DETAILS	**REQUIREMENTS**
Requirement ⌄	Type
FormTest FORMS - Life & Legacy Plus 1 & 2 Progress Report	Progress Report

Submit a new requirement

Click on the "**Submit Form**" hyperlink in the Requirement Submission link section. You may also access the form on the home page.

∨ Requirement Submission Link

Requirement Form
Submit Form

Application Reponses

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. If you are requested to edit any of your responses, you will be able edit the responses here.

Payments

The **Payments Tab** displays all past and currently scheduled payments for the grant, along with the status. A status of **Contingen**t means that a requirement must be completed before the payment can be processed.

Files

The **Files** tab displays attachments that have been submitted.

Sharing Application Access

Application Access allows you to add or remove users to your application. New users will receive an email notification and be able to view the application in their grants portal account. You can share edit with a colleague from the **Grant Detail** page by clicking on "**Application Access**" and then "**Add User.**" You will prompted to submit the name, email address, and role of the additional user. You may choose to allow view only access or edit access. Edit access will allow additional users to make edits and submit reports.

Transferring Ownership

If the primary contact who submitted the grant application is no longer at your organization, or unable to submit their report, ownership of a grant or requirement can be transferred to a different account by our team.

You may contact us via email at grants@hgf.org or via the **Suppor**t tab. Please be sure that your message includes the name of the grant, the current primary contact, and the new contact's name and email address. Please note that only the owner of a grant record can manage the sharing of that grant or add new collaborators.

Logging out

To sign out of your account, click "Logout" from the dropdown next to your name.

Need more help?

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

To submit a case, fill out the required fields with the Subject, Description, Type, and Grant Track on the right side of the screen. You can also upload any relevant files, such as 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.

Thank you for your interest in the Harold Grinspoon Foundation's grants. If you have any questions about the grants portal or our grants programs, please contact us at grants@hgf.org, submitting a Support Case in the portal, or by calling (413) 276-0700, option 2.