ONLINE APPLICATION SYSTEM

Users Guide

LIBERTY BANK FOUNDATION

COMMUNITY

SPOTLIGHT ON COMMUNITY PARTNERSHIPS
INTRODUCTION

Our grant application is online at last! Long term, we expect it will prove easier and more efficient for both of us. However, we realize there’s an initial learning curve. That’s why we created this guide. We hope you’ll find it helpful.

As you use the system, we invite you to tell us about any issues you encounter so we can request a system update (if needed) and/or revise this guide and also make all users aware.

Sue Murphy smurphy@liberty-bank.com
Toral Maher tmaher@liberty-bank.com
Jane Brosnan jbrosnan@liberty-bank.com

Thanks in advance for your patience as we implement our new system—we’re all learning together!
FIRST TIME SIGN-ON

After you call us and get a green light to apply for a grant, we’ll email you a link to the application best suited to the request discussed:

- program/project grants
- general operating grants
- capacity building grants

Click the email link and you will land on the “Login” page. Select the “New Applicant?” link. Here you’ll enter your email address and set up your password. Then, click “Continue.” Please write down your credentials as these will remain the same, whenever you use our system.

You’ll also receive an email from MicroEdge Services notifying you that (by signing on) your grant application has been created, and giving you a link to it.
APPLICATION OVERVIEW
WELCOME PAGE

This is where you’ll begin any application. Use the tabs at the top of the page to navigate between sections of the application – welcome, organization information, grant request, supporting documents, and review my application. You will see these same tabs at the top of every page. Also note other handy features which allow you to quickly access help, send us an email, and create a printer-friendly version of your application.
The **Organization Information** is where you’ll enter data about your agency itself. If you are a returning grantee, this will be prefilled. If so, please take a minute to ensure everything we have on file is correct. This includes contact information for your executive director or CEO, as well as information for the agency employee acting as the contact for this grant request. If the grant request contact is the CEO, you can check “Same as Above” to indicate that.
APPLICATION OVERVIEW
GRANT REQUEST

On the Grant Request page, you’ll enter all the information about your request. If you’ve applied to us in the past, many of these questions will look familiar. Please remember that we now have three types of applications. Our programs/projects application most closely resembles the application with which you are familiar. Our new capacity-building and general-operating grant applicants are different.

SUPPORTING DOCUMENTS

Use this page to upload documents such as your 501(c)(3) letter, project budget, etc. We can accept documents in .pdf, .xl, and .doc formats. If your organization does not produce a requested document, please note that on a plain piece of paper and upload that.
APPLICATION OVERVIEW

REVIEW MY APPLICATION

At any point, you can click the “Review My Application” tab to see your. At the top, you’ll see any error messages notifying you of missing data or any other items that need attention before you submit your app. Scroll down, and you’ll see the application data you’ve entered it so far. Any required fields that you’ve left blank will be flagged; you can complete them on this screen if you like, or navigate back to the specific page to do so. If you make changes here, just remember to click the “Update” button at the bottom before you leave the Review My Application page.

NAVIGATION

The grant application consists of several pages; you can navigate from page to page by clicking the red tabs just beneath the Liberty Bank Foundation logo. DO NOT USE YOUR BROWSER’S BACK BUTTON while you’re in the application!! The “Back” button will throw you out of the system, and you’ll lose all data that you haven’t saved. At the bottom of every page of the app, you’ll see a “Next” button you can use to navigate to the next page (as an alternative to clicking the red tabs at the top.)
SAVING YOUR WORK

At the bottom of every page of the application, there is a button labeled “Save and Finish Later.” Please use this button to save your application at any point. Doing so will save your work; it will also take you out of the grant application form and to the main Applications page (see below.) There you will see a message telling you your app has been saved. There’s also a list of all applications you’ve saved; you can select the one you’ve been completing and continue working if you want.

We realize that it’s inconvenient to have to link back to your application every time you save it. We’ve asked our vendor to add a simple “Save” button that will allow users to save their work and remain on the current page. This is in the works. For the time being, though, “Save and Finish Later” is the only means of saving your work without actually submitting the grant app. We recommend you use it often, as our system does not autosave.
APPLICATION FIELDS

**Required Fields:** Required fields have a red asterisk. You must supply this information in order to submit your application. If you click “Submit” and a required field is blank, an error message will notify you of missing information. Once all required fields are completed, click “Submit.”

**Dollar Amount Fields:** For example, “Amount Requested” and Total Program/Project Budget format automatically without your having to enter dollar signs or commas.

**Date Fields:** These allow you to type the date using the format mm/dd/yyyy, or click the calendar icon to select a date.

**Percentage Fields:** Please keep in mind that the total of your entries must equal 100%.

**Text fields:** Long text fields, for example where you describe your grant request, allow you to expand them to better read what you have typed. To do this, simply click the square icon to the right of the text box. Some text fields limit the number of words that can be entered. This is shown just below the field in which you are typing. Please note that pressing “Enter” in a text field does not add to your word count, so feel free to put returns between paragraphs and include lists, if it makes sense to do so.

**Spell Check:** In long text fields, you can spell check your work by clicking the red checkmark to the right of the box in which you type.
UPLOADING SUPPORTING DOCUMENTS

On the Supporting Documents page, you’ll find a list of documents we will need you to submit along with your grant application. To upload a document:

1. Place your cursor in the box below the document name and click Browse.
2. Navigate to the document on your computer and click on it. You should see the document name appear in the box.
3. Click Upload.

If you have uploaded successfully, a red bar will appear; underneath will be the document name, date uploaded, and file size.

Please use PDF, Word, or Excel formats for your documents so that we will be able to open them easily.

If you have difficulty uploading a document, check the top of the page for an error message. Sometimes the total file size of all docs uploaded can exceed the system’s capacity. If you can reduce the size of your largest files, that may allow you to upload them. If you’ve tried a couple of times unsuccessfully, please email the large docs to your program officer and we’ll upload them from here.
SUBMITTING YOUR APPLICATION

Once you’ve finished the app, click the “Review & Submit” button at the bottom of the page. This will give you a final look at your app and display error messages for any missing data or documents. If everything looks OK and you’re ready to submit, click the Submit button on the bottom of the page. This will take you back to the Applications page, where you’ll see this:

After submitting your application, you’ll receive an email from MicroEdge Services notifying you that the app has been saved successfully. The email will contain a copy of your app for your records.

So as you’re looking at the Applications screen now, you may be wondering, “Why don’t I see my application here anymore?” Look at the dropdown box at the right side: the screen is set to show In Progress Applications. Since your app is now complete, you’ll need to change the dropdown to read Submitted Applications in order to see it.

Take a look under the “Action” heading on the “Applications” page, and you’ll see a couple of options. One icon allows you to transfer your grant application to someone else in your agency. (You might want to do this while you’re completing the app, to allow a colleague add info that you don’t have.) The other icon allows you to email the application.

After you’ve submitted your first grant application, you’ll be returned to the “Applications” screen each time you sign onto our system.
NOTE: Although you can view any application, you can’t make edits to an application that has been submitted. If for some reason we need you to edit your application, your program officer will notify you and return the app for you to edit and resubmit.