

## **Online Application Help**

The Search for Grants website is noted throughout this document, however we also manage many other foundations that are not hosted on the website, but do utilize our online applications. Therefore, some of these FAQs may not apply to all of the foundations we manage.

### **General**

- When do you accept online proposals?
- What is a Supporting Organization, 509(a)(3)?
- I do not know my organization's Employee Identification Number (EIN). How can I find it?
- How can I find my organization's NTEE code as designated by the IRS?

### **Navigation**

- How do I create a new online account?
- How can I see the application before I get started?
- Once I begin the online application, can I save and finish it later?
- What do I do if the online application is not saving my answers and does not seem to be functioning?
- How do I access my user account if I cannot locate my welcome email containing the URL to return to the
- I saved the application in My Favorites, but when I click on it I'm getting an error. What do I do?
- My email address changed at my organization. How can I update it on the MyAccount page?
- My colleague and I are working together on an application. How can we collaborate electronically?
- What do I do if there was a previous staff person working on an application who has since left our organization?

### **Process**

- What are the recommended steps to take before filling out an online grant application?
- Can I apply to more than one foundation?
- Before I apply online, I would like to see the application questions. How can I get a copy?
- Where can I view a foundation's grant history?
- How do I qualify for a grant from foundations managed by U.S. Trust, Philanthropic Solutions?
- What happens if I do not answer a required question marked with an asterisk?
- After reviewing several foundations on the Search for Grants site, I noticed 2 distinct grant application formats. Why are they different?
- What are the sections of the online grant application?
- Can I move between sections of the application without completing all required fields first?
- Do application text fields have word limits?
- How do I print a submitted application?

### **Attachments**

- What are the required application attachments and where can I find more detail?
- Can I attach or include other materials beyond the required attachments?
- What file formats are accepted for attachments?
- What if I do not have the required attachments in an electronic format?
- I uploaded the required attachments, but the system is indicating that they are missing. Why is that?

### **Submission**

- How do I submit my application once I am done?
- How can I be sure I am sending everything required for a grant application?
- How can I view or get a copy of my completed application before I submit it?
- How will I know if you received my application?
- When will I be contacted about the status of my grant request?
- Do you accept grant applications after the due date?

## General

### When do you accept online proposals?

Online grant applications will be accepted 24-hours a day, 7 days a week, generally on, or prior to the proposal due date. However, applicant inquiries can only be answered during normal business hours, **Monday through Friday, 9 a.m. – 5 p.m. EST.**

Please be advised that technical support is **not** provided on weekends for password resets or general technical inquiries. Therefore it is best to start your application early, seek technical support during business hours, and to submit your application in advance of the due date. Technical issues can be reported to [grantmaking@ustrust.com](mailto:grantmaking@ustrust.com) and we will respond during the business hours noted above. See specifics on regional deadline procedures below.

### Deadline procedures for foundations managed by the following offices: CA, DC, GA, IL, MO, NY and TX

Please submit online applications by 11:59 p.m. on the day of the foundation's deadline date. If the application deadline date falls on a weekend or a federally recognized holiday, we do not extend the deadline, therefore applications must be submitted on the prior business day by 11:59 p.m.

### Deadline procedures for foundations managed by the following offices: CT, MA, RI and WA

Please submit online applications by 11:59 p.m. on the day of the foundation's deadline date. If the deadline falls on a weekend or a federally recognized holiday, applications are due on the next business day by 11:59 p.m.

### What is a Supporting Organization, 509(a)(3)?

Visit the IRS page on Supporting Organizations ([https://www.irs.gov/charities-non-profits/section-509\(a\)\(3\)supporting-organizations](https://www.irs.gov/charities-non-profits/section-509(a)(3)supporting-organizations)) to learn more.

### I do not know my organization's Employee Identification Number (EIN). How can I find it?

An organization's Employer Identification Number (EIN), also known as a federal Tax Identification Number (TIN), is used to identify a nonprofit entity. An EIN is a unique 9-digit number, for example 123456789 or 12-3456789.

To look up your organization's EIN, visit the IRS website to access the Exempt Organizations Select tool (<https://www.irs.gov/charities-non-profits/exempt-organizations-select-check>), or contact the Internal Revenue Service Call Center at 1.877.829.5500. If your organization is a religious organization, municipality, subdivision of state or a school, your organization may not be required to have a Federal TIN. If this is the case, leave the Tax ID field blank in the online grant application.

### How can I find my organization's NTEE description as designated by the IRS?

The National Taxonomy of Exempt Entities (NTEE) system is used by the IRS to classify nonprofit organizations. You can search for your organization's NTEE description on Guidestar ([www.guidestar.org](http://www.guidestar.org)). If you find your NTEE description on Guidestar, locate that same NTEE **description** (not the NTEE code) in the search tool of the online grant application. (To do this, select the down arrow in the application's NTEE search box to view the entire list. To narrow your choices, enter your organization's NTEE description in the search box and select **Search**. Finally, select the down arrow to view the match options. Select the description that best describes your organization. To clear your selection, select **Reset**.)

If your organization is a church, municipality, subdivision of state, or a school, your organization may not be listed on Guidestar. If your organization does not have a NTEE listed, or is not in Guidestar, choose the NTEE description from the NTEE dropdown list in the online grant application that most closely matches your organization's type.

[\(Back to top\)](#)

## Navigation

### How do I create a new online account?

Creating a Bank of America online grant application account enables you to have online access to the MyAccount page which serves as your own online grant application user account. This account will store both your applications in progress and your submitted grant applications.

To create your user account, select **Apply now** from a foundation's detail page on our website, or from your invitation email. Select the **New applicant** link, enter your email address (or one designated by your organization) and re-enter the email address to confirm. Create a password, confirm it and then select **Continue**. You will be prompted to set up security questions. After setting up your answers, the application will launch.

After submitting your security answers, you may be presented with an eligibility quiz. Once you pass the eligibility quiz, you will be granted access to the online application. You will also receive an account setup confirmation via email that will include the URL for the [MyAccount](#) sign-in page. This URL enables you to return to the [MyAccount](#) page and access your in progress applications or any of your previously submitted applications at any time. In progress and submitted applications are retained on the site for 120 days.

### How can I see the application before I get started?

After creating a new account, or logging into an existing one, you may be presented with an eligibility quiz. Once the eligibility questions are answered correctly, you'll then gain access to the application. On the Instructions page, you will be able to review the foundation's online application questions in advance by selecting the **Printer friendly version** link. A read-only version of the application will open. Select **File** then **Print** on your browser's toolbar. Answers can be prepared offline and pasted into the online grant application at a later time.

Note: The eligibility quiz and the required attachments will not be captured on the printer-friendly version. They can be printed from directly from your browser window. You must submit your application online. Do not mail the printer-friendly version.

### Once I begin the online application, can I save and finish it later?

Yes. After creating an online account, you will receive a welcome email with a unique URL to access your [MyAccount](#) page at any time. Retain this email for your records. When working on an application, you may select **Save & finish later** located on every page of the application. You can also access the [MyAccount](#) page by using the [Return to an application in progress](#) link from the welcome email, or access it from the foundation's detail page when you are ready to complete and submit your application.

### What do I do if the online application is not saving my answers and does not seem to be functioning?

1. Confirm that you are accessing your saved, in-progress application by selecting the [Return to an application in progress link](#). The Apply now button just initiates a new, blank application. If you are using the Return to an application in progress link, check 2-8 below for other common causes.
2. Check your connection to the internet. Open a browser and access a website other than the online application form to test your connectivity.
3. Next, check to see if you have a compatible browser installed on your computer. The online application is compatible with **current** versions of the following browsers: Internet Explorer®, Mozilla® Firefox®, Safari®, and Google Chrome. If your computer is not fully updated, you may experience difficulty saving answers in your application. It is best to use an updated computer that has a compatible browser. Unfortunately, we cannot diagnose personal computer compatibility issues.
4. Your browser must be enabled to accept cookies.

[\(Back to top\)](#)

5. Your browser cache may be full and therefore reading prior sessions. This can impact the retention of your answers, the stability of your session, and can cause error when resetting your password. You should delete your browser temp files and cookies. (google for cache clearing instructions) Close all of your browsers. If your temp files were not cleared at the time you entered and lost the answers, you may have to enter them again in a new session. After refreshing your browser, return to the foundation's webpage, or the application link provided to your organization to log in and start your application.
6. Before you fill out the whole application, test the following. If your browser and temp files were recently cleared, close all of your browser windows and then go to your [MyAccount](#) page and open the in-progress application. After opening the application, fill in one of the fields on the **About Your Request** section. Then click **next** to go to the next page which should save your information on the prior page. Then go back to the **About My Request** page to verify that your test answer saved. If yes, then proceed to fill out the application, occasionally selecting next to save your answers.
7. If you are **not** receiving saving and submission confirmation emails or password reset emails, your server maybe blocking them. Set up our system's auto email address as trusted: U.S. Trust PhS Grantmaking: mail@grantapplication.com. (no reply)
8. If you believe you submitted your application, but receive a Save email confirmation rather than a Submission email confirmation, you may not have clicked the final **Submit** button. When you click **Review and Submit** that opens the application Review page only. You still have to select **Submit** at the bottom of the application to fully submit your grant application. Go back to your in-progress application, open it. Click **Review and Submit** and then **Submit**.
9. If you are still experiencing problems, here are some tips to help us to trouble-shoot your issue:
  - Identify the browser type and version you are using
  - Your account email address (Don't send us your password!)
  - Note the foundation to which you are applying
  - Note exactly what steps you took when you encountered the problem
  - Take a screenshot of any error messages that you receive.
  - Send this information to the contact listed in the regional procedures document, or to grantmaking@ustrust.com.

#### **How do I access my user account if I cannot locate my welcome email containing the URL to return to the [MyAccount](#) page and my online application?**

You can access your [MyAccount](#) page by pasting the following URL into your browser: [https://www.GrantRequest.com/SID\\_1116?SA=AM](https://www.GrantRequest.com/SID_1116?SA=AM). You can also return to your invitation email, or any foundation's Search for Grants detail page and select the [Return to an application in progress link](#).

#### **I saved the application in my Favorites, but when I click on it, I'm getting an error. What do I do?**

If you save the application URL as a favorite in your browser, note that you should first delete the cookie 'CT=CT&' from the browser address and then save it again in order to access the site successfully. It is best to access your **In progress** applications directly from your [MyAccount](#) page link, however.

#### **My email address has changed at my organization. How can I update my existing account on the [MyAccount](#) page?**

Sign in to your [MyAccount page](#) using the email address that was used to originally set up the account and enter the password. At the top of your [MyAccount](#) page is a Change email/Password link. Select that link, enter in your new email address and select Update.

[\(Back to top\)](#)

### **My colleague and I are working together on an application. How can we collaborate electronically?**

To avoid loss of functionality within your applications, it is highly recommended that only one staff member log into 1 account at any given time. There are collaborative tools within the actions column of the MyAccount portal that can be used to share drafts of applications with colleagues. There is an icon to enable sharing of a view only copy of the application-**Viewers**, as well as an option to **Transfer an application** to a new owner. When transferring an application to a new owner, or sharing a view only copy, a new account is automatically set up if the user does not yet have one. The new owner must accept the request and complete the account set up.

### **What do I do if there was a previous staff person working on the application who has since left our organization?**

If you know the previous staff person's email address, we may be able to transfer your organization's historical applications to the new account for your organization. If you would like to request a transfer, email us at [grantmaking@ustrust.com](mailto:grantmaking@ustrust.com). You must have an existing organizational account in order for us to do a historical application transfer. If you do not have one, the instructions for setting up your new account are on the top of page 3.

Please include the name of your organization, your name and email address, the foundation to which you are applying and the email address of the prior staff person. If you do not have the prior staff person's email address, we may be able to look it up for you.

### **Why do I not see an application that I submitted recently on the [MyAccount](#) page?**

There is a drop-down arrow on your [MyAccount](#) page where you can select either **In progress** or **Submitted applications**. If you saved or submitted the application correctly, you will be able to access applications in either status by selecting one of the two options. If you believe that you submitted your application, but you still find it in the **In progress** folder, you may have only selected **Review and Submit** when you last worked on the application which only opens the Review page.

After reviewing, you still have to select **Submit** at the bottom of the application to fully submit the application. Open the **In progress** application and select **Review and Submit** and then **Submit**. You will receive an email confirmation of the submission and a message on your [MyAccount](#) page indicating the application was submitted successfully.

## **Process**

### **What are the recommended steps to take before filling out an online grant application?**

- Thoroughly review the foundation's detail page on [our website](#), or the materials provided in your invitation email. Carefully review the mission and guidelines to ensure your grant request is appropriate and in alignment with the foundation's priorities and focus areas.
- For the foundations hosted on our website, review the foundation's state-specific application Procedures attachment. This document is attached in the Application & Procedures section of each foundation's page and lists important information such as foundation contact information, determination timeframes and grant requirements, etc.
- Review the foundation's online application questions in advance. To do this select **Printer friendly version** on the application page. Answers can be prepared offline and pasted into the online application later
- Review the list of required attachments. Prior to beginning the application, prepare the required documents for upload. PDF, Word or Excel are all acceptable electronic formats, but PDF is preferred, specifically for budgets. Each attachment must not exceed 25 megabytes. Make sure that your attachment file names do not use special characters such as apostrophes and dashes. Including characters sometimes impacts our ability to successfully import attachments.
- Do not use all caps or insert tables, charts and/or columns in the application's long text fields.

[\(Back to top\)](#)

### **Can I apply to more than one foundation?**

If there are restrictions regarding applying to more than one foundation annually, it will either be noted on the foundation's webpage, or within the regional Procedures document.

### **Before I apply online, I would like to see the application questions. How can I get a copy?**

In order to obtain a copy of a foundation's application, search for the foundation's detail page and select Apply now in the Application and procedures section. Sign into your existing [MyAccount](#) page, or set up an account by clicking on the New Applicant link. After you log in, the application will present. If there is an eligibility quiz, complete that and then you will be presented with the application. Next, select the Printer friendly version link at the top of the application page. Select File and then Print from your browser menu. Note: This feature will not capture the eligibility questions or the required attachments. Those pages have to be printed directly from your browser window.

### **Where can I view a foundation's grant history?**

Each foundation has a link to the most recent list of grantees in the 'Grant history' section of each Foundation's detail page. The Foundation Center ([www.foundationcenter.org](http://www.foundationcenter.org)) maintains an interactive U.S. map of foundation grants as part of its *Foundation Directory Online Professional*, a database of U.S. grantmakers and grants. For more information, please see the FAQ tab on the Search for Grants website. Each foundation's grant information is updated annually as part of our participation in the Foundation Center's electronic grant-reporting program. Please note that the **Grant history** links will direct you away from the Search for Grants website and will not open in a separate window.

### **How do I qualify for a grant from the foundations managed by U.S. Trust, Philanthropic Solutions?**

The foundations listed on the Search for Grants site support tax-exempt, IRS-qualified 501(c)(3) public charities. Proposals will be considered from eligible, tax-exempt organizations in certain 501(c)(3) subsections as defined by the Internal Revenue Service (IRS). View the specific foundation detail page and the regional Procedures document for guidance on priorities, restrictions and geographic focus areas of the foundation to which you are applying.

### **What happens if I do not answer a required question marked with an asterisk?**

All required information on the application is indicated with a gray asterisk. You will not be able to submit your application until all of the required questions have been completed. When you click **Review and submit** at the end of the application, you will be presented with a list of required but incomplete fields, if applicable. Once all required fields are completed, click **Update** at the end of the application. You will also be required to **label & upload** all attachments before submission.

### **After reviewing several foundations on the Search for Grants site, I noticed 2 distinct grant application formats. Why are they different?**

Since each foundation on our site has its own unique mission and focus area, grant application forms vary slightly from foundation to foundation. In general, we have 2 standard grant application formats: a comprehensive version and a concise version. For example, a foundation may use the comprehensive application format if it awards larger, multi-year grants while another foundation may use the concise application version if it awards smaller grants.

In designing the 2 application formats, we incorporated many of Project Streamline's recommendations in an effort to improve our grant application, monitoring, and reporting practices. Project Streamline is a collaborative initiative of many organizations involved in philanthropy. This initiative guides leaders in grantmaking and nonprofit organizations on how to identify challenges, propose solutions and develop resources to help foundations streamline and right-size grant applications and requirements. An outline of each format can be found on the next page.

[\(Back to top\)](#)

### **What are the sections of the online grant application?**

Depending on the mission, guidelines and strategy of a foundation, one of 2 application formats is used: Comprehensive online application or the concise version of the online application.

The **comprehensive application** is comprised of the following 7 sections:

1. Instructions
2. About Your Organization
3. Your Grant Request
4. Goals & Outcomes
5. Organization Financials & Acknowledgement
6. Attachments
7. Review My Application

The **concise application** is comprised of the following 6 sections:

1. Instructions
2. About Your Organization
3. Your Grant Request
4. Goals, Outcomes & Acknowledgement
5. Attachments
6. Review My Application

### **Can I move between sections of the application without completing all required fields first?**

There is a progress meter at the top of the application that allows you to toggle through the pages of the application by clicking on each chevron page title. This will allow you to jump to different sections of the application while saving any data entered on the prior page. The **Next** button on the bottom of the page will allow you to progress directly to the next page and save information as well.

### **Do application text fields have word limits?**

Many of the long text fields in the applications utilize a word limit. The text fields that have word limits present a word counter that allows you to track the number of words used in each of your answers.

### **How do I print a submitted application?**

The [MyAccount](#) page lists both your in progress and submitted grant applications. Select the submitted application you would like to print, and a printer-friendly version of your application will open in another window. Select **Printer friendly version**. Go to **File** and then select **Print**. Please note that the **Printer friendly version** will not include the attachments submitted with the application.

[\(Back to top\)](#)

## Attachments

### What are the required application attachments and where can I find more detail?

The required attachments are:

1. Board List
2. Organizational Budget
3. Project Budget (required if submitting a project or program request)
4. Financial Statements (audited, reviewed or compiled by independent auditor)

Depending on the foundation, the following may also be required:

1. Organization Summary
2. Other Funding Sources
3. IRS Determination Letter
4. Letter of Support

More detail regarding the attachments is provided within the attachment section of each foundation's application. All attachments must include the specific attachment name, page numbers (if an attachment includes multiple pages), your organization's name and the name of the foundation to which you are applying.

### Can I attach or include other materials beyond the required attachments?

Do not include materials other than the required attachments listed in the online application. We will contact you for additional information if necessary.

### What file formats are accepted for attachments?

PDF is the preferred electronic format for attachments, however word and excel are also accepted. PDF is specifically preferred for budgets. Do not send materials other than what is requested. Note that each attachment must not exceed 25 megabytes in size and must not be password-protected. If an attachment has multiple pages, upload it as one document. All attachments must include the specific attachment name, page numbers, your organization's name and the foundation's name to which you are applying.

### What if I do not have the required attachments in an electronic format?

Attachments must be submitted electronically. You cannot submit the application and send in the attachments later. Applications that do not include the required attachments cannot be submitted. If you do not have the documents prepared at the time you reach the attachments section of the application, select **Save and finish later** to save and exit out of your application. You can then prepare the attachments offline and return to your application in progress when you are ready to upload the required documents.

If you do not have the required documents electronically, scan the documents into PDF files. If you do not have a scanner at your organization, we recommend you use the services of a copy shop or a public library.

### I uploaded the required attachments, but the system is indicating that they are missing. Why is that?

Check the system labels on your uploaded attachments in your application. If they all have the same label, e.g. (Board List) that indicates that the proper label wasn't chosen from the drop down list in the upload tool. Delete the mis-labeled attachments and try again. Select the proper attachment label from the drop down box. Click the browse button and locate your document and select **Open** or **OK** and then **Upload**. Repeat the process for each document.

[\(Back to top\)](#)



## Submission

### How do I submit my application once I am done?

Once all of the fields are complete and the attachments are uploaded, you can click on the **Review & submit** button on the bottom of the attachments page. Once you have reviewed your application, click the **Submit** button.

If fields are incomplete, you will receive a message indicating which fields need to be completed before you can submit your application. Once your application has been submitted, no changes will be able to be made. Your submitted application will be stored for 120 days on your [MyAccount](#) page.

### How can I be sure I am sending everything required for a grant application?

Click **Review my application** in the progress meter and it will display the information you entered and will highlight missing information, or missing required attachments. The site will not allow you to submit your application until the required information is completed and the required attachments have been uploaded.

### How can I view or get a copy of my completed application before I submit it?

There are several ways to view, save and/or print your application before submitting.

- Click **Printer friendly version** then go to **File** and **Print**
- Click **Printer friendly version** then select **File/Send (Page by email)** to send the printer-friendly version to your email address
- Click **Printer friendly version** and select **Save As (HTML)** to save the file on your desktop. You can also view or print the application after it has been submitted from the submitted applications section of your [MyAccount](#) page.

### How will I know if you received my application?

Once you submit your application and it is received by our organization, you will be brought to your [MyAccount](#) page which will display the following message: "Thank you! Your application has been submitted." You will see your submitted application listed under the **Submitted applications** section of your [MyAccount](#) page. You will also receive an email confirming that the application was successfully **submitted**. If the confirmation email states that your application has been Saved, but does not specifically say Submitted, that means you probably have to reopen your application in your [MyAccount's](#) In-progress folder and Select **Review & Submit** and then **Submit**.

### When will I be contacted about the status of my grant request?

We regret that we cannot respond to individual inquiries regarding the status of applications and appreciate your patience with the process. You will be notified in writing of the status of your application by each foundation's respective notification date. We will follow up for additional information if necessary. Please note that we do not post the status of applications online. Grant determination timeframes differ from foundation to foundation. Please refer to the regional Procedures documents on our [website](#) to review the estimated decision dates, if noted.

### Do you accept grant applications after the due date?

The majority of foundations **do not** accept late applications. See specifics on regional deadline procedures below.

#### Deadline procedures for foundations managed by the following offices: CA, DC, GA, IL, MO, NY and TX

Please submit online applications by 11:59 p.m. on the day of the foundation's deadline date. If the application deadline date falls on a weekend or a federally recognized holiday, we do not extend the deadline, therefore applications must be submitted on the prior business day by 11:59 p.m.

#### Deadline procedures for foundations managed by the following offices: CT, MA, RI and WA

Please submit online applications by 11:59 p.m. on the day of the foundation's deadline date. If the deadline falls on a weekend or a federally recognized holiday, applications are due on the next business day by 11:59 p.m.

While online applications may be submitted on the weekends, please be advised that technical support is **not** provided on weekends for password resets or general inquiries regarding the online forms. Therefore it is best to start your application early, seek technical support during business hours, and to submit your application in advance of the due date. Technical issues can be reported to [grantmaking@ustrust.com](mailto:grantmaking@ustrust.com) and we will respond during business hours.

[\(Back to top\)](#)