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.

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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 (Mon-Fri 9 a.m.-5 p.m. ET).

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 submit your application in advance of the due date. Technical issues can be reported to grantmaking@ustrust.com and we will respond during the business hours noted. Please note the following specifics on regional deadline procedures:

- **Deadline procedures for foundations managed by the CA, DC, GA, IL, MO, NY and TX offices:** 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 CT, MA, RI and WA offices:** 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 (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 (irs.gov/charities-non-profits/exempt-organizations-select-check) or contact the Internal Revenue Service Call Center at 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 (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 in the dropdown list of the online grant application that most closely matches your organization's type.

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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 one account will store all of your applications in progress and your submitted grant applications to any of the private foundations managed by U.S. Trust, whether the foundation is hosted on our website or you were invited to apply to the foundation via email.

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 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 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, please review the following 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. 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.

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5. Your browser cache may be full and therefore reading prior sessions. This can impact the retention of your answers and the stability of your session, and can cause an error when resetting your password. You should delete your browser's temporary files and cookies. (If you don't know how, you can search online for instructions specific to your browser version and type.) Close all of your browsers. If your temporary 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 web page, or the application link provided to your organization, to sign in and start your application.

6. Before you fill out the whole application, test the following: If your browser's temporary files and cookies 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 **Save & 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 was saved. If it was, then proceed to fill out the application, occasionally selecting **Save & Next** to save your answers.

7. If you are not receiving confirmation emails or password reset emails, your server may be blocking them. Set up our system's auto email address as trusted: U.S. Trust PhS Grantmaking: mail@grantapplication.com

8. If you believe that 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. Clicking **Review and Submit** opens the application-review page only. You still have to select **Submit** 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 troubleshoot your issue:
   - Identify the browser type and version you are using
   - Provide us with 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. You can also return to your invitation email, or any foundation's Search for Grants detail pages, and select the **Return to an application in progress** link.

I saved the application in my Favorites, but I'm getting an error when I click on it. 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. However, it is best to access your **In progress** applications directly from your MyAccount page link.

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**.

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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 sign in to one 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 or requirements with colleagues. There is a **Viewers** icon to enable sharing of a view-only copy of the application as well as an option to **Transfer an application/requirement** to a new owner. When transferring 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 and requirements to the new account for your organization. If you would like to request a transfer, email us at 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 dropdown menu 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 2 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. 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.
- Review the foundation's online application questions in advance. To do this select **Printer-friendly version** on the application page. It is recommended to prepare answers offline in a Word document and then paste the answers into the online application later. That way you have a backup of your application.
- 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
- You can use same MyAccount to apply to any of the appropriate foundations we manage, whether you access the **Apply now** link via our website or from within an invitation email

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Can I apply to more than one foundation?

If there are regional restrictions regarding applying to more than one foundation annually, it will either be noted on the foundation's web page, 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 in to your existing MyAccount page or set up an account by selecting the **New Applicant** link. After you sign in, you'll see the application. 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 (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 select **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' applications on the Search for Grants site, I noticed different 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.

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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 **Save & Next** button 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. Open the submitted application that you would like to print by double clicking on it, then go to **File** and then select **Print**. (Please note that this will not include the attachments submitted with the application.)

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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 (for example, Board List), that indicates that the proper label wasn't chosen from the dropdown menu in the upload tool. Delete the mislabeled attachments and try again. Select the proper attachment label from the dropdown menu, select the **Browse** button to locate your document, select **Open** or **OK** and then **Upload**. Repeat the process for each document.

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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 select the **Review & submit** button on the bottom of the attachments page. Once you have reviewed your application, select 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:

- Select **Printer-friendly version** then go to **File** and **Print**
- Select **Printer-friendly version** then select **File/Send (Page by email)** to send the printer-friendly version to your email address
- Select **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 of the status of your application via email or hard copy letter by each foundation's respective notification date. We will follow up for additional information if necessary. The status of applications is not posted online. Grant determination timeframes differ from foundation to foundation. Please refer to the regional procedures documents on our Search for Grants 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. Please note the following specifics on regional deadline procedures:

- **Deadline procedures for foundations managed by the CA, DC, GA, IL, MO, NY and TX offices:** 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.
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