

## Frequently Asked Questions

### What is the Grantee Portal?

The James Irvine Foundation's [Grantee Portal](#) is an online system used by applicants and grantees for the submission of invited grant proposals and their related attachments and reports. In addition, registered users may use the [Grantee Portal](#) to view their previously-submitted materials and to update their personal and organizational contact information.

### Which web browsers are recommended to access the Grantee Portal?

We recommend that you use Firefox or Chrome as your internet browser. Apple Safari and Internet Explorer will access the site, but may cause technical difficulties and/or changes in page layout.

### How do I access the Grantee Portal?

If your organization has been invited to submit a proposal, you will receive an invitation email from your [program associate](#). The invitation will include a checklist of the information and documents needed to complete the online proposal as well as your username and, if you are a first time user, a password. If you have not received a username and password, but will be assisting with the online application or future reporting, please contact your [program associate](#) to request that a username and password be created for you.

### What if I have forgotten my username or password?

Your username is your primary email address. If you have forgotten your password, click on the, "Forgot your password?" link found on the login page of the [Grantee Portal](#). You will be prompted to enter your email address and will receive a temporary password to this address. When you login using the temporary password, you will be prompted to reset your password.

### How do I change my password and/or update my contact information?

You may change your password and update your personal and organizational contact information by clicking on the "Profile" link in the upper right-hand corner of the Grantee Portal after you log in. Please contact your [program associate](#) or [Adam Cimino](#), Associate Grants Manager, if you would like to edit your username. Please *do not* overwrite contacts' names: if a new staff members joins your organization, rather than simply write-over the former staff member's contact name in the portal, please notify [Adam Cimino](#), and he can create a new contact record and new username and password as appropriate.

### How do I begin working on a proposal once it has been invited?

After logging in with the information provided by program staff, you will be directed to the "My Submissions" page. There, your recently invited grant will have a pencil and paper icon in the Edit

column on the left-hand side of the Open Items tab. When you click on the edit icon of a grant record, you will be redirected to three tabs: Details, Attachments and Review & Submit. Please note that you can save and return to your work until you are ready to submit your application. Once you have pressed submit on the third tab, program staff will be notified to review your materials and you will no longer have editing capabilities.

### **How do I submit a report?**

Reports due will appear on the “My Submissions” page below the related grant record; their due dates are listed on each row. When you are ready to upload and submit your materials, click on the appropriate row’s pencil and paper icon in the edit column on the left-hand side of the Open Items tab. This will direct you to three tabs: Details, Attachments, Review & Submit. Please note that you can save and return to your work until you are ready to submit your reports. Once you have pressed submit on the third tab, program staff will be notified to review your materials and you will no longer have editing capabilities.

### **How do I navigate between tabs on the portal?**

Whether you are working on a grant application or uploading a report, you will be required to press “Save” before you can navigate to additional tabs.

If you are working on a grant application, the Details tab will include several text fields. By pressing “Save” to advance to the next tab, you will save your work completed in the text fields and a reminder at the top of the page will note any mandatory fields that are still unpopulated. You must then press “Continue” or directly on the Attachments tab itself to navigate away from the Details tab.

If you are uploading a report, the Details tab requires no action. You should confirm the report type and grant information match before pressing “Save” to advance to the next tab. You must then press “Continue” or directly on the Attachments tab itself to navigate away from the Details tab.

### **How do I change the documents I have uploaded on the Attachments tab?**

If you have not pressed the “Submit” button on the third tab, you may return to the Attachments tab and change any of the materials uploaded. To do so, press the light blue “Delete” link on the file you would like to remove. Then use the Select File button to upload a new document.

### **Why did the name of my document change after I uploaded it to the portal?**

Documents are renamed for benefit of the Foundation’s own internal file management. If the renamed document title does not match the content of the document you are uploading, please verify with your [program associate](#) or [Adam Cimino](#), Associate Grants Manager, that the document is required for your submission. In addition, you may reference your proposal guidelines or the Grantee Reporting Guidelines section of your grant agreement.

### **Several people at my organization will be working on this grant application and/or its reports. Should we all create our own accounts?**

You may share your username and password with co-workers. However, it is important to note that the user logged in at the time of submission will be the only individual to receive an email confirmation of the transaction. In addition, user profiles may only represent an individual (first name, last name, title, etc.) and may not be listed as organizations or individual departments within a larger organization.

If you have not received a username and password, but will be assisting with the online application or future reporting and would like your own login, please contact your [program associate](#) or [Adam Cimino](#), Associate Grants Manager, to request a username and password be created for you. Please do not self-register as there is no way for a self-registered user to link their account to an existing organization record.

### **May I start a grant application or reporting requirement and then save it to finish later?**

Yes, you may save your work and return to the [Grantee Portal](#) to complete your application or uploading reports at a later date. Once you have pressed the “Submit” button, you will lose the ability to edit text fields, dropdown menu options and attached documents.

Note that you are required to populate several text fields and dropdown menus options on the Details tab in order to press save and navigate away from the tab. The portal will not auto-save your work; if you close a Details tab without pressing save, you will lose any unsaved data you have entered.

The Attachments tab will save each document individually as you successfully upload them. Therefore, this tab will not require you to press save to navigate away from it.

### **May I upload additional electronic files (PDF, Word, Excel, etc.) to submit with my application or reporting requirement?**

If you would like to upload additional materials that have not been requested in the proposal guidelines or in your grant agreement’s reporting guidelines, please contact your [program associate](#) for assistance.

### **Should I mail the Foundation additional materials in support of my application or active grant such as videos, photos, or binders?**

Please do not mail additional materials related to a pending or active grant without first coordinating with your [program associate](#).

### **When I log in, I do not see the grant or report I need to edit.**

Please contact [Adam Cimino](#), Associate Grants Manager, for assistance.



**A contact at a fiscally sponsored organization needs access to an application or grant record, but should not have access to the fiscal sponsor's other records.**

Please contact [Adam Cimino](#), Associate grants Manager, for assistance.