



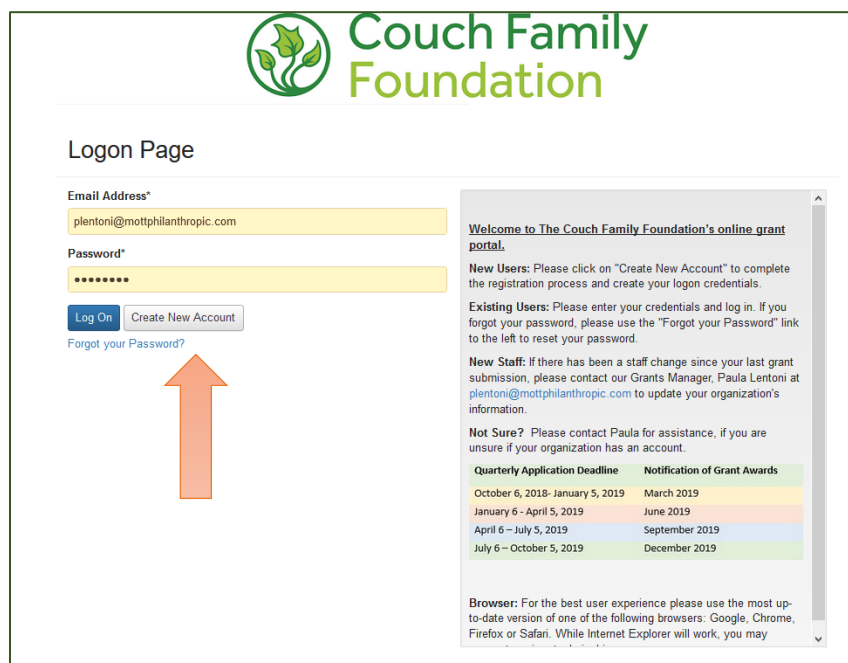
Online Account Setup, Helpful Hints, and FAQ's

Creating a New Account

Visit this webpage to set up your online grant portal:

<https://www.grantinterface.com/couchfoundation/Common/LogOn.aspx>

If your organization does not yet have an account, click the "Create New Account" button.


A screenshot of the Couch Family Foundation's online grant portal login page. The page has a white background with the Couch Family Foundation logo at the top left. Below the logo, the title "Logon Page" is centered. On the left side, there are two yellow input fields: "Email Address*" with the text "plentoni@mottphilanthropic.com" and "Password*" with masked characters "*****". Below these fields are two buttons: a blue "Log On" button and a grey "Create New Account" button. A red arrow points upwards from the bottom towards the "Create New Account" button. Below the buttons is a link that says "Forgot your Password?". On the right side, there is a grey sidebar with a scroll bar. The sidebar contains the following text: "Welcome to The Couch Family Foundation's online grant portal.", "New Users: Please click on 'Create New Account' to complete the registration process and create your logon credentials.", "Existing Users: Please enter your credentials and log in. If you forgot your password, please use the 'Forgot your Password' link to the left to reset your password.", "New Staff: If there has been a staff change since your last grant submission, please contact our Grants Manager, Paula Lentoni at plentoni@mottphilanthropic.com to update your organization's information.", "Not Sure? Please contact Paula for assistance, if you are unsure if your organization has an account.", and a table with two columns: "Quarterly Application Deadline" and "Notification of Grant Awards". The table has four rows of data. At the bottom of the sidebar, there is a "Browser:" section with text about using up-to-date browsers like Google, Chrome, Firefox, or Safari.



Online Account Setup, Helpful Hints, and FAQ's

Organization Information

Complete the required information and steps: Organization Information and Applicant Information, Executive Officer information (if you are not the Executive Officer, CEO or President) and so on.



Couch Family Foundation

Cancel Account Creation

Create New Account

If you already have an Account, click the 'Cancel Account Creation' button to go to the Logon page

⚠ Using the browser's back button will delete your registration information.

ℹ This registration process has multiple steps you must complete before you can apply.

Fields with an asterisk (*) are required.

Organization Information

Organization Name*

EIN / Tax ID (##-####*)

Web Site

Telephone Number (###-###-#### x###)*

Organization Email

Address 1*

Address 2

City*

State*

Postal Code*

Country

Next >

User Information

Executive Officer Question

Additional Executive Officer Information

Password



Online Account Setup, Helpful Hints, and FAQ's

Applicant Information

Create New Account

This registration process has multiple steps you must complete before you can apply.

⚠ Using the browser's back button will delete your registration information.

ℹ Fields with an asterisk (*) are required.

Your Information

Copy Address from Organization

Prefix (Mr, Mrs, Ms, etc.)*	First Name*
<input type="text"/>	<input type="text"/>
Middle Name	Last Name*
<input type="text"/>	<input type="text"/>
Suffix (Sr, Jr, III, etc.)	Business Title*
<input type="text"/>	<input type="text"/>
Email / Username*	Email / Username Confirmation*
<input type="text"/>	<input type="text"/>
Telephone Number (### ### x###)*	Mobile Number (### ###)
<input type="text"/>	<input type="text"/>
Address 1*	Address 2
<input type="text"/>	<input type="text"/>
City*	State*
<input type="text"/>	<input type="text"/>
Postal Code*	Country
<input type="text"/>	<input type="text"/>



Online Account Setup, Helpful Hints, and FAQ's

Registering an Executive Officer

Create New Account

This registration process has multiple steps you must complete before you can apply.

⚠ Using the browser's back button will delete your registration information.

ℹ Fields with an asterisk (*) are required.

Your Information

Copy Address from Organization

Prefix (Mr, Mrs, Ms, etc.)*	First Name*
<input type="text"/>	<input type="text"/>
Middle Name	Last Name*
<input type="text"/>	<input type="text"/>
Suffix (Sr, Jr, III, etc.)	Business Title*
<input type="text"/>	<input type="text"/>
Email / Username*	Email / Username Confirmation*
<input type="text"/>	<input type="text"/>
Telephone Number (### ### x###)*	Mobile Number (### ###)
<input type="text"/>	<input type="text"/>
Address 1*	Address 2
<input type="text"/>	<input type="text"/>
City*	State*
<input type="text"/>	<input type="text"/>
Postal Code*	Country
<input type="text"/>	<input type="text"/>





Online Account Setup, Helpful Hints, and FAQ's

Registering an Executive Officer (continued)

Create New Account

This registration process has multiple steps you must complete before you can apply.

 Using the browser's back button will delete your registration information.

 Fields with an asterisk (*) are required.

Executive Officer (Executive Director, CEO, President, Program Director, etc.)

Are you the Organization's Executive Officer?*

☐ Yes


☒ No


Previous StepNext Step

Creating a Password

Create New Account

This registration process has multiple steps you must complete before you can apply.

 Using the browser's back button will delete your registration information.

 Fields with an asterisk (*) are required.

Password

Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#\$%^&*()_

Password*

Confirm Password*

Previous StepFinish



Online Account Setup, Helpful Hints, and FAQ's

Email Confirmation

Ensure that you received the registration email from Couch Family Foundation administrator@grantinterface.com

If you cannot find this email, check your spam folder. All emails from the system will come from this address, so be sure to add it to your list of safe senders, if necessary.

Email Confirmation

You will be receiving emails from this system about your request.

To ensure you receive emails from this system we have sent you an email to confirm your account was created successfully. If you do not see an email from, 'The Couch Family Foundation', please check your spam folder.

[Click Here](#) for a tutorial about removing email addresses from spam filters.

☐ I have received the email
☐ Continue without checking
☐ I have not received the email

Multiple Users

If more than one person will be applying for grants, please feel free to share this log in information with your coworkers.

If your agency requires multiple logins, please contact Paula Lentoni, help@couchfoundation.org. Please **DO NOT** create a duplicate organization profile.



Online Account Setup, Helpful Hints, and FAQ's

Applying for a Grant

When logged in to your new account, click the "Apply" link in the left sidebar.





Online Account Setup, Helpful Hints, and FAQ's

Choosing an Application

There are three grant applications that you may choose from. Please review the criteria, and select the application which best fits your organization or grant request.

If you have any questions regarding which application to select, please contact info@couchfoundation.org.

Community Grant Application

- The organization is a 501(c)3 non-profit or is fiscally sponsored by a 501(c)3 organization.
- The organization is located in or serves the Upper Valley region of New Hampshire and Vermont or Island of Martha's Vineyard.
- The organization is a **first-time applicant** to the Foundation; or
- The organization is a **returning applicant** to the Foundation, but has received less than two consecutive years of funding; or
- The organization is a **returning applicant** to the Foundation, seeking project-specific funding.

Early Childhood Education Provider Application

- Your organization is a 501(c)3 non-profit or is fiscally sponsored by a 501(c)3 organization.
- The organization is a first-time or returning applicant
- Your organization provides early childhood education programs in the Upper Valley region of New Hampshire and Vermont.

Annual Grant Application or Sponsorship Request

- The organization is a 501(c)3 non-profit or is fiscally sponsored by a 501(c)3 organization.
- The organization is located in or serves the Upper Valley region of New Hampshire and Vermont or Martha's Vineyard.
- The organization is a current grantee of the Foundation (i.e., received unrestricted support or sponsorship support from the Foundation in 2017) and is seeking unrestricted support or sponsorship of an event in 2018.



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Using an Access Code

Some grant applications are by invitation only and may require an access code.

If you have been given an access code please enter it at the top of the screen.



Apply	<input type="text" value="Enter Access Code"/>	<input type="button" value="Enter Code"/>
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GuideStar

In an effort to strengthen your organization and streamline the application process, the Couch Family Foundation encourages you to update your organization's GuideStar Nonprofit Profile.

If you would like to learn more about GuideStar Nonprofit Profiles, please visit the website below.

<http://www.guidestar.org/rxb/products/resources/guidestar-profiles-for-grant-applications.aspx>

<https://learn.guidestar.org/update-nonprofit-report?search=false&search=false#UpdateProfile>

About GuideStar Nonprofit Profiles

GuideStar Nonprofit Profiles provide information about the nonprofits in our database to the 7 million people who visit our website each year. Millions more see profile information on the more than 170 sites and applications that display GuideStar data.

So [update your organization's profile](#) today.

Have questions about updating or can't find your nonprofit on GuideStar? [Contact us](#) and let us help.



Online Account Setup, Helpful Hints, and FAQ's

Inputting information into the Application

- We recommend you review the questions that are included in the grant application. You may view, share, or print them by selecting the **"Question List"** icon at the beginning of the application.

- You do not need to complete the entire application at one time. There is a "Save Application" button at the bottom of the screen.
- If you leave out required application information, the system will not allow you to submit without completing the missing section(s). You must then select **"Update"** and then **"Submit Application"** to finish the submission process.

Collaborate Icon



The **Collaborate Feature** allows you to work with another individual(s) in the preparing and submission of an online application.

You may invite someone to:

Can View	View the grant application you have been working on
Can Edit	View and make edits to the grant application
Can Submit	View, edits, and submit the grant application



Online Account Setup, Helpful Hints, and FAQ's

Applicant Dashboard

Applicant Dashboard

Public Profile

Applicant: Ms. Paula I. Antoni

Organization: Mott Philanthropic

12-34567
617-927-
800 Boyl
Boston ,

Contact Email History

If your organization information does not appear correct, please click the edit (pencil) icon.

Active Requests 0 Historical Requests 1

You do not have any Active Requests. Click [Apply](#) to begin the application process.

Active Request Tab

An application in the "Active Request" tab has been submitted and waiting approval or has been approved.

Active Requests 2

Process: 2019 Couch Family Foundation Community Grant Application

Application	Draft	06/10/2019	Edit Application
Decision	Undecided		

Process: 2018 Couch Family Foundation Community Grant Application

Application	Submitted	06/27/2018	View Application
Decision	Approved	11/26/2018	View Details

Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Signed Project Grant Award Letter		Overall Award		Complete	View
2018 Community Reporting Form		Overall Award	10/05/2019	Assigned	Edit

Documents uploaded by Administrator

DESCRIPTION	FILE
Grant Agreement & Check	

Follow-ups

A Follow-up form is something the grant recipient needs to provide to Unitarian Universalist. This may be a letter of acknowledgement, a signed agreement. You will receive an email reminding you of the due date before and if it is past due.

Documents uploaded by Administrator

Any documents we wish to share can be found in this area.



Online Account Setup, Helpful Hints, and FAQ's

Helpful Reminders

- If you remain on a page with inactivity for longer than 90 minutes, you will be logged off for security reasons.
- You do not need to complete an application in one session. There is a SAVE button at the bottom of the application.
- The system will auto save as you move from one question to the next and will save every 100 characters in longer text responses. Auto save is noted by the border of the question highlighting in green.
- We will not review your application until it is submitted, so you can save and come back as many times as you would like.
- If you have more questions, please visit our Frequently Asked Questions page:

Frequently Asked Questions:

Q: What if my organization needs more than one login?

A: Consider sharing a login if you feel it is appropriate. If you would like more than one user to have a login, please contact Paula Lentoni, help@couchfoundation.org.

Q: What if I forget my password?

A: Use the "Forgot your Password?" link on the Log-on page.

Q: What if emails from the Foundant system are going to Spam folders?

A: Add administrator@grantinterface.com to your contacts, safe senders list or mark as "Not Spam" depending on your email service. All emails from the Foundant system will come from this email address.

Q: How do I upload files to my application?

A: For application questions that request an uploaded attachment, click the **Browse** button and then choose the desired document from your computer. The file name of the uploaded file will be indicated under the Browse button. Then save your application (button at the bottom of page). Pay attention to your file names – remove extra periods or replace them with a dash or underscore character. If you need to add more than one, please contact Paula Lentoni for help.

Online Account Setup, Helpful Hints, and FAQ's

Q: What if my file size is too big to upload?

A: You can take the following steps:

- Ensure that unnecessary graphics or attachments are removed
- Reduce the size of your PDF files: Choose File> Save as Other> Reduced Size PDF
- Use this online tool to compress your PDF files into smaller sizes: <https://smallpdf.com/compress-pdf>
- Use Foundant's Fax to File option to create a smaller file
- After taking these steps, contact Paula Lentoni, help@couchfoundation.org if your file size is still too large to upload.

Q: How do I utilize the "Fax to File" tool?

A: Using the "Fax to File" tool can be pretty simple and can be used instead of a scanner to create an electronic version of a document:

- To start, click the Fax to File link on the left hand side of your screen
- Then click the Request a Fax # button and you will be presented with a toll-free fax number. You have this number for 20 minutes.
- Fax your document to the number provided. Send a separate fax for each document and do not include a cover sheet. All faxed documents will be automatically converted to a PDF. You have 20 minutes to fax your documents before the number expires.
- After you have faxed each separate document click the Finished Faxing button to see your list of files.
- Download your converted documents to your computer and save them.
- Upload the documents to the appropriate questions on the online form.

Q: Why am I having trouble uploading my file?

A: There are a few different reasons that one may experience file upload issues:

- File names—remove extra periods or replace them with a dash or underscore
- File size—Files that exceed the maximum file size limit will cause an error.

Q: Can I upload more than one document into one upload field?

A: Yes. If you have multiple documents you will need to combine them into one file by using a scanner or the "Fax to File" tool before uploading.

Q: How do I delete a file that I have uploaded to a form in Foundant?

A: There are two ways to remove an old file from an application: 1. Once the file has been uploaded a delete button will appear below the file name. Click the Delete button to remove the file. 2. A new file can just be uploaded in its place and it will be automatically deleted.



Online Account Setup, Helpful Hints, and FAQ's

Q: Can multiple users be Foundant working on the same application at the same time?

A: It is possible, but we do not recommend it. Foundant's auto-save feature could save over important changes made by both users.

Q: What if I need to stop in the middle and come back to the application later?

A: There is a Save button at the bottom of the application.

Q: Which browser do you recommend we use?

A: For the best user experience when using Foundant, we recommend using the most updated version of Google Chrome, Firefox or Safari. It is fine to use Internet Explorer, but you may encounter some minor technical issues.

Q: What if my organization does not have an EIN?

A: Enter N/A in the field.

Q: What if I have further questions that you haven't answered here?

A: Please contact Paula Lentoni, help@couchfoundation.org with any further questions.