

## Grants Portal – Evaluator “How to Steps”

### Logging On

To get started, click the link provided to you by the organization’s site administrator. This will take you to the *Logon Page*. The site administrator has created an account for you, so you will only need to set your password before you can logon.

1. If this is your first time here, click *Forgot Your Password* to securely set your password.



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Logon Page

Email Address\*

Password\*

Log On Create New Account

Forgot your Password?

Welcome to Foundant's SLM's Online 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.

**Not Sure?** If you think that you have already registered in the system, do not create a new account. Please contact our Grant Administrator to receive your username.

- Going forward, you may enter your logon credentials and click **Log On**.
- Do not click *Create New Account*, as that option is for applicants only.
- If you were an OHA Grant Evaluator before and have an evaluator account, login with your information. If you forgot your password, click “Forgot your Password”.

2. After logging on, you will land on your dashboard.

### Your Dashboard

Your dashboard displays all evaluations assigned to you. You can always return here by clicking the **Home Icon** in the top navigation bar.

We are conducting a blind evaluation, some columns on the Dashboard may include information as [HIDDEN].

At the top of the page is a visual representation of your assigned evaluations. This status bar also shows you how many of your evaluations are in each status (Pending, Draft, Complete, Closed):

Foundant for Learning - GLM John Allen

FOUNDANT technologies Shared Documents My Organization Chart Role (Staff Evaluator)

### Dashboard

Your Evaluations **12** Your Follow Ups **0**

Pending **9** Draft **1** Complete **2**

Quick Search

FORM	PROCESS	ORGANIZATION	APPLICANT FIRST NAME	APPLICANT LAST NAME	PROJECT	SCORE		
	Staff Evaluation - Spring	Spring Grant Process	Arc of the US	Nathan	Murphy	Creating creative awareness	57%	Update
	Staff Evaluation - Spring	Spring Grant Process	Boys & Girls Clubs of America	Arthur	Mitchell	General operating support and facility improvements	57%	Update
	Staff Evaluation - Spring	Spring Grant Process	World Wildlife Fund, Inc.	Juan	Taylor	Conservation operations support		Start
	Staff Evaluation - Spring	Spring Grant Process	International Association of Fire Fighters	Joshua	Smith	General Operating support		Start
	Staff Evaluation - Spring	Spring Grant Process	Direct Relief	Abigail	Clark	No needles here- drug addiction recovery community support		Start
	Staff Evaluation - Spring	Spring Grant Process	Covenant House	Douglas	Smith	Community Closet		Start
	Staff Evaluation - Spring	Spring Grant Process	Global Peace Film Festival, Inc.	Richard	Robinson	Lodging for Filmmakers		Start

- Clicking a status in this bar will filter your list to only show evaluations in that status. Clicking the status again will remove the filter.

Below the status bar is the list of your assigned evaluations.

- The columns in this table can be sorted (i.e. by applicant or by scholarship) by clicking on the column header.
- The *Review* icon and text (in the farthest column to the right), indicates the status of each evaluation:
  - Pending: A red exclamation mark indicates that no questions on the evaluation form have been completed. Click the icon to *start* the evaluation.
  - Draft: A yellow exclamation mark indicates that some questions have been completed, but not all required questions have been completed. Click the icon to *continue* the evaluation.
  - Complete: A green checkmark appears after you've completed all required questions on the evaluation form. Click the icon to *update* the evaluation if needed.
  - Closed: A paper icon indicates that evaluations have been closed by an administrator for that request. You may view but not edit your responses on closed evaluations. Click the icon to *view* the evaluation.
- If scoring questions are used on the evaluation form, the *Score* column is calculated by dividing the total point scored by the total points possible.
  - The score will appear in this column once all required questions on the evaluation form are completed.

### Completing Evaluations

1. To begin click the link in the far-right column to enter the evaluation form.

Dashboard

Your Evaluations 20 Closed Evaluations 3 Your Follow Ups 0

Pending 16 Draft 2 Complete 1 Closed 1

Quick Search

FORM	PROCESS	ORGANIZATION	APPLICANT FIRST NAME	APPLICANT LAST NAME	PROJECT	SCORE	
Staff Evaluation - Spring	Spring Grant Process	Arc of the US	Nathan	Murphy	Creating creative awareness	57%	View
Staff Evaluation - Spring	Spring Grant Process	Boys & Girls Clubs of America	Arthur	Mitchell	General operating support and facility improvements	57%	Update
Staff Evaluation - Spring	Spring Grant Process	World Wildlife Fund, Inc.	Juan	Taylor	Conservation operations support		Start
Staff Evaluation - Spring	Spring Grant Process	International Association of Fire Fighters	Joshua	Smith	General Operating support		Start
Staff Evaluation - Spring	Spring Grant Process	Direct Relief	Abigail	Clark	Distribution Support		Continue
Staff Evaluation - Spring	Spring Grant Process	Covenant House	Douglas	Smith	Community Closet		Start

2. Your evaluation form will look like this:

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Requests & Decisions Shared Documents eReport Map My Organization Chart Role (Board Member)

### Evaluation

Conservation operations support  
Process: Spring Grant Process

Return to Application Evaluation Assigned

Contact Info Request Award Details Documents Comments GuideStar Charity Check

**Applicant:**  
Juan Taylor  
JuanTaylor@FExample.org

**Organization:**  
World Wildlife Fund, Inc.  
52-1693387  
701 N Fairfax St  
Alexandria, VA 22314

**Your Evaluation** Evaluation Packet

Question Group

**Project Name**  
Name of Project:  
Conservation operations support

**View Application** Application Packet

Question Group

**Project Name**  
Name of Project:  
Conservation operations support

3. You will evaluate on the left-hand side and the application will be on the right-hand side. The dashed line down the middle can be moved either way to expand either side.

4. If documents have been uploaded to the form, you can view these within the site by selecting the **Document Viewer** button.

- This feature can also be accessed by clicking on the “eye” icon next to any uploaded document within the form.
- Within the document viewer you can page and zoom on documents, switch between uploaded forms, and download documents using the download icon.

5. Select a score and leave a comment.

The system will automatically save your answers as you complete the evaluation form.

Once you have completed the form, click **Save** at the bottom of the page. This will take you to a Confirmation page. Any required questions that are marked with an asterisk and were not

completed will be listed on this page. Note that until all the required questions have been completed, the status will not be updated from a red exclamation mark to the green check mark.

The screenshot shows two side-by-side forms. The left form, titled 'View Application', contains fields for 'Project Name' (Fundraising and food gathering community outreach BK 19K), 'Do you have a fiscal sponsor?' (Yes/No), 'Amount Requested' (\$ 2,500.00), 'Geographic Area Served' (Midwest, South, West, Northeast), 'Project Description' (Lorem ipsum dolor sit amet...), and 'Focus Area' (Social Services). The right form, titled 'Your Evaluation', contains sections for 'Project Alignment' (Is this project in alignment with the intent of this grant?), 'Goals & Outcomes - Feasibility' (Please indicate your confidence in the applying to organization to achieve their stated goal(s)), 'Overall Score' (0-10), 'Would you fund this grant?' (Yes/No), and 'Additional Comments' (10,000 characters left of 10,000). A 'Save' button is at the bottom right of the evaluation form.

- Clicking *Next Pending Evaluation* will take you to your next assigned evaluation.

Clicking *Return to Dashboard* will take you back to your dashboard where evaluation assignments are listed.

The screenshot shows a 'Confirmation Page' with a green success message: 'Your Evaluation has been saved.' Below this is a blue box with a warning icon and the text: 'The following required questions have not been answered: Goals & Outcomes - Feasibility, Overall Score, Would you fund this grant?'. At the bottom, there are three buttons: 'Return To Evaluation', 'Return to Dashboard', and 'Next Pending Evaluation'. Two yellow arrows point to the 'Return to Dashboard' and 'Next Pending Evaluation' buttons.

You can return to a completed evaluation form and change your responses up until the time that the administrator closes the evaluation stage by clicking back onto the review icon and text on the Dashboard.

You may create a PDF of the evaluation form with your responses by clicking on the **Evaluation Packet** button.

### Logging out of the system

To logout of the system, click on your name in the top right corner of the page and click **Sign Out**.