

Online Grant Portal User Guide Application Process

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Introduction

The Conservation Trust Online Grant Portal will be used for all stages of the grant application, review, and reporting process. This user guide is intended as a tool to facilitate navigating the application process through the Online Grant Portal, including organization registration, eligibility quiz, letter of interest, and full application form.

The 5 main components that this Grant Portal User Guide will address are:



Organization Registration and Account Creation

First Step

- Registering your organization and creating a user account.
- If you already have an account registered with the correct organization, you may proceed to the eligibility quiz.
- If you do not have an account and your organization has previously applied for Trust funding, contact the Trust Team at CTInfo@mhhc.mb.ca to receive your username.
- If your organization has not previously applied for Trust funding, complete the following steps to register your organization and create your user account.

NOTE: you must complete the organization registration and user account creation in one session.

1. On the Conservation Trust Online Grant Portal logon page, click "Create New Account".



A Manitoba Climate and Green Plan Initiative delivered by The Manitoba Habitat Heritage Corporation

Logon Page

Email Address*	Welcome to the Conservation Trust Online Grant Portal.
Password* Log On Create New Account Forgot your Password?	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 have forgotten your password, please use the "Forgot your Password" link to the left to reset your password.
	Not Sure? If you think that you or someone at your organization has already registered in the system, do not create a new account. Please contact the Conservation Trust team at CTInfo@mhhc.mb.ca to receive your username.
	Before you apply, please read the Conservation Trust Guidelines and Applicant Guide.

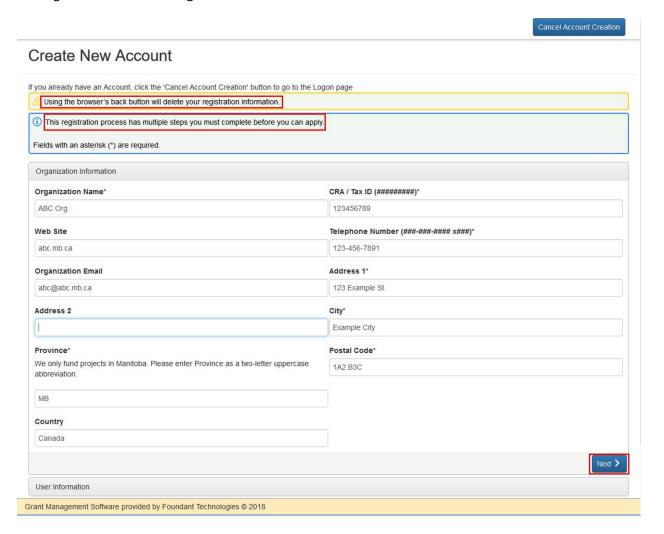
2. Complete the Organization Information form. You should use your organization's general email and telephone number, NOT your personal employee email and telephone number, as you will use these to complete the User Information form on the next form.

NOTE: you will need your organization's 9-digit CRA business number to complete the form.

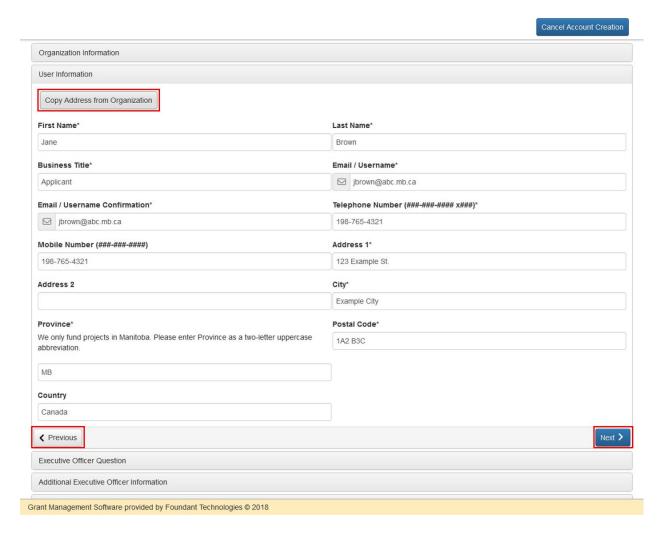
3. Click "Next" at the bottom right of the form when you have completed all required fields.

NOTE: fields marked with an asterisk on all forms are required.

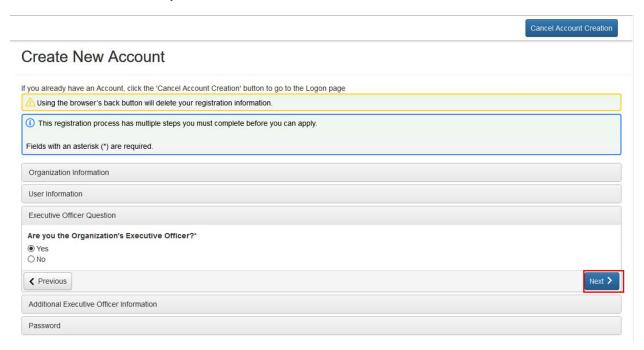
NOTE: Do **NOT** use your browser's back button to navigate back to previous forms. This will delete your registration information. User the "Previous" and "next" buttons at the bottom of each registration form to navigate between forms.



- 4. Complete the User Information form, using your personal employee work email and telephone number. You may copy the organization's address information using the "Copy Address Information" button at the top left of the form.
- 5. Click "Next".



6. a) If you are your organization's executive officer or equivalent, click "Yes" then "Next" on the Executive Officer Question form.



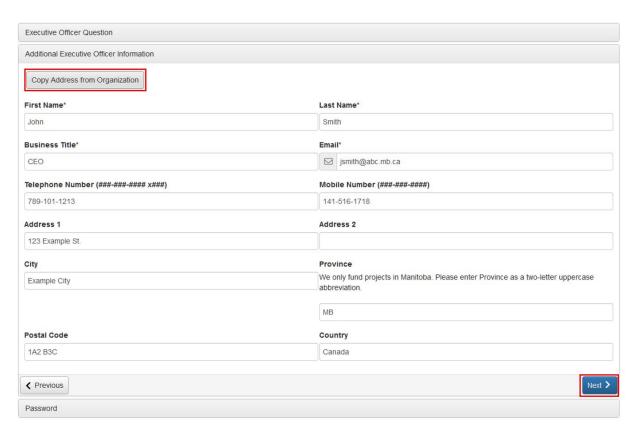
Fill in an address if different from your organization's address on the Executive Officer Additional Information form. Click "Next".



b) If you are not your organization's executive officer, click "No" then "Next" on the Executive Officer Question form.



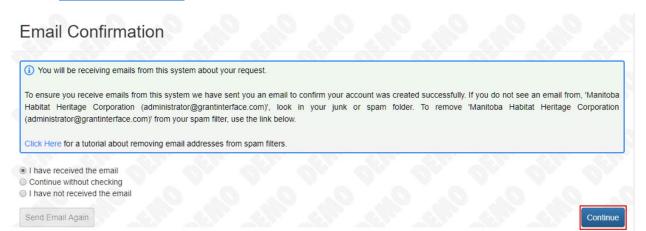
Fill in the organization's executive officer's information on the Executive Officer Additional Information form. You may copy the organization's address information using the "Copy Address Information" button at the top left of the form. Click "Next".



7. Choose and confirm a password containing at least six characters. Click "Create Account".



- 8. You will receive an email confirming your organization's registration. After ensuring that you have received the confirmation email, select "I have received the email" and click "Continue". You can now log on to the Conservation Trust Online Grant Portal to apply for funding.
- 9. If you do not receive a confirmation email within 30 minutes, contact The Trust Team at CTInfo@mhhc.mb.ca or 1-833-323-4636.

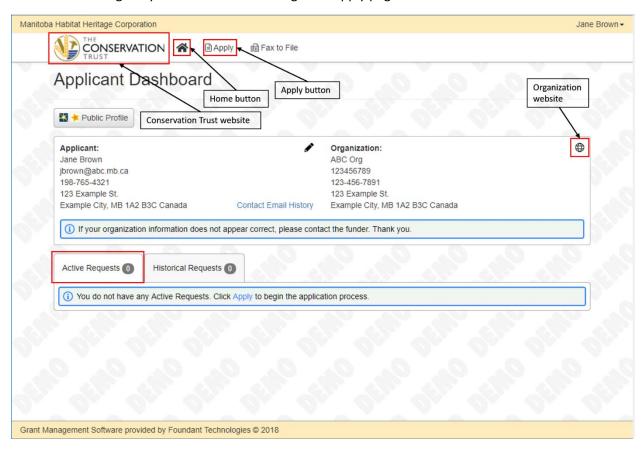


Online Grant Portal Account Navigation

Upon completing the Conservation Trust Online Grant Portal organization registration and account creation, you will be directed to the Apply page. The graphic below illustrates how to navigate your Online Grant Portal account:

- "The Conservation Trust" logo in the upper left corner links to the Conservation Trust website. Program and application information, and resources can be found on the Conservation Trust here.
- The Home button navigates to the Applicant Dashboard. The Applicant dashboard displays your
 user (applicant) and organization information. The globe button in the upper right of the
 applicant/organization information box links to your organization's website. The Active Requests
 and Historical Requests tabs at the bottom of the Applicant Dashboard will display information
 about the status of your funding applications.
- The "Apply" button navigates to the Apply page.

NOTE: The Eligibility Quiz is accessed through the Apply page.



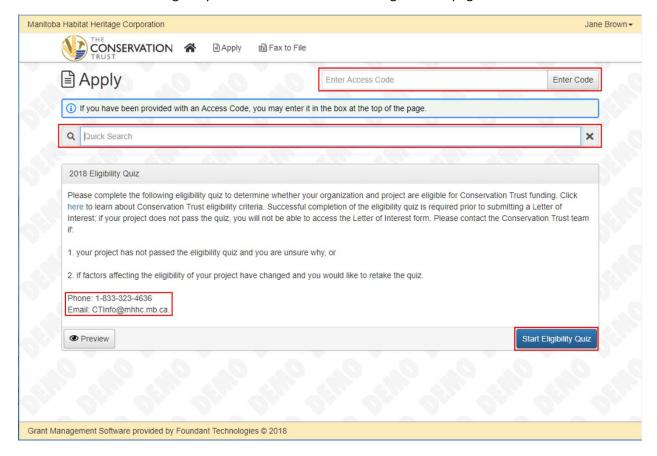
Eligibility Quiz

To access the Letter of Interest (LOI) form and begin applying for Trust funding, you must pass the Eligibility Quiz. Access the Eligibility Quiz by clicking on the "Apply" button at the top of the account page. The Apply page contains the following features:

- a text box containing information on the Trust Eligibility Quiz. Ensure that you read this information and review the linked Trust eligibility criteria prior to beginning the quiz.
- a Quick Search bar, which can be used to search your account using any keyword.
- an Access Code box at the top right of the Apply page. Access codes will <u>not</u> be used during the
 Trust application process. Instead, successful completion of the Eligibility Quiz will be required
 to access and complete the LOI form. The Access Code box should be ignored.

To complete the Eligibility Quiz:

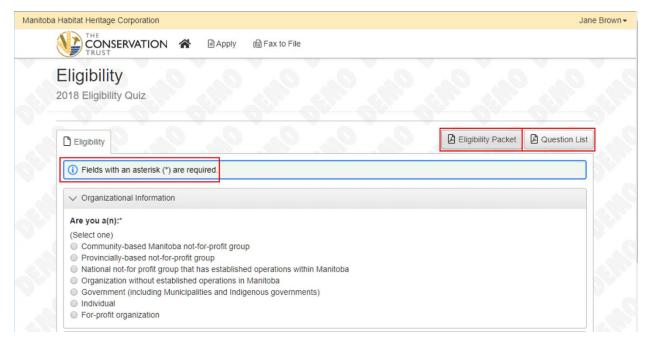
1. Click the "Start Eligibility Quiz" button at the bottom right of the page.



2. Answer all questions.

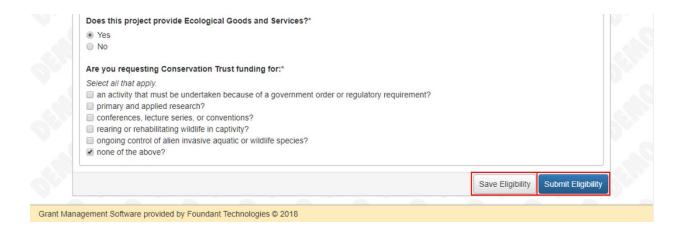
NOTE: questions with an asterisk are required on any form, and all questions on the Eligibility Quiz are required.

NOTE: the "Question List" button at the top right of the quiz allows you to download a PDF copy of the Eligibility Quiz questions for offline reference. The "Eligibility Packet" button allows you to download a PDF copy of the Eligibility Quiz questions with your answers for offline reference.

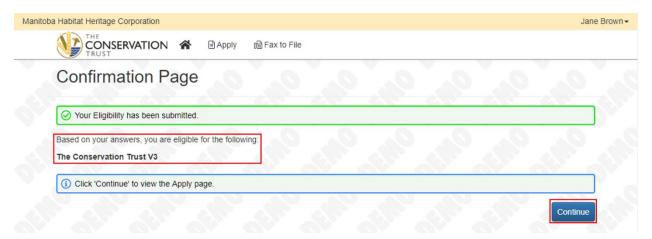


3. Click "Submit Eligibility" at the bottom right of the quiz when you have completed all questions.

NOTE: you may save your Eligibility Quiz at any point and complete it at a later time.



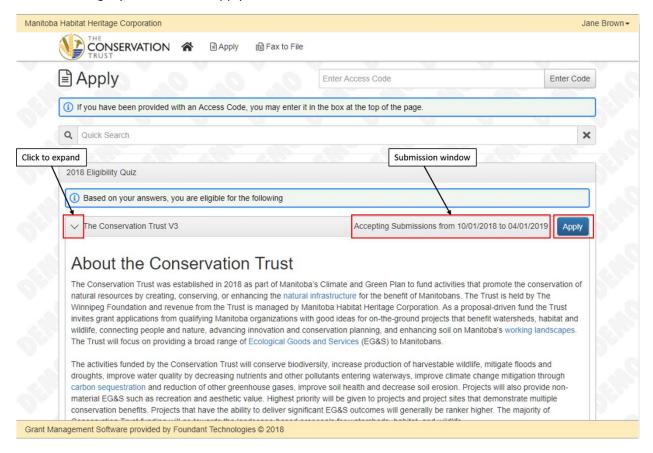
- 4. After submitting your Eligibility Quiz, you will be redirected to a confirmation page.
- 5. a) If you passed the Eligibility Quiz, the funding opportunity you are eligible for will be displayed. Click "Continue" to access the Conservation Trust LOI form.
 - b) If you did not pass the Eligibility Quiz and you wish to retake the quiz or to inquire about Conservation Trust eligibility criteria, contact The Trust Team at CTInfo@mhhc.mb.ca or 1-833-323-4636.



Letter of Interest

Upon passing the Eligibility Quiz, you will be redirected to the Apply page. You will now be able to see "The Conservation Trust" displayed under the Eligibility Quiz. To submit your LOI, complete the following steps:

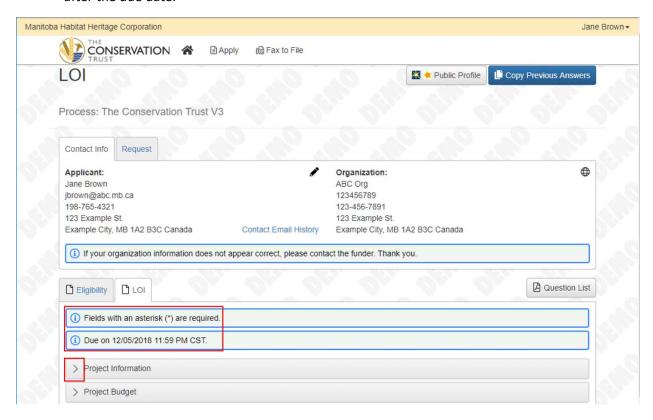
- 1. Before you begin, click the arrow to the left of "The Conservation Trust" heading. This will expand a text box containing information on the Conservation Trust program, funding categories, eligibility criteria, and timelines.
- 2. Note the submission deadline is displayed beside the "Apply" button.
- 3. To begin your LOI, click "Apply".



4. You will be redirected to a Letter of Interest (LOI) form. The form contains several sections (e.g. Project information). You can expand each section by clicking the arrow to the left of the section heading to view the questions.

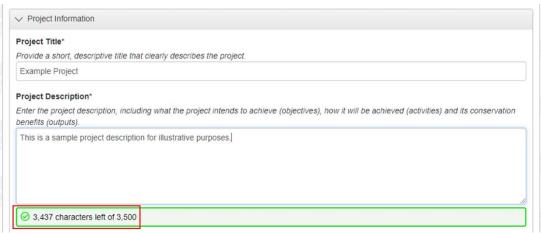
NOTE: as in all forms, fields marked with an asterisk are required. You will not be able to submit your form if any required fields are blank.

NOTE: the LOI due date is displayed at the top of the form. You will not be able to submit an LOI after the due date.



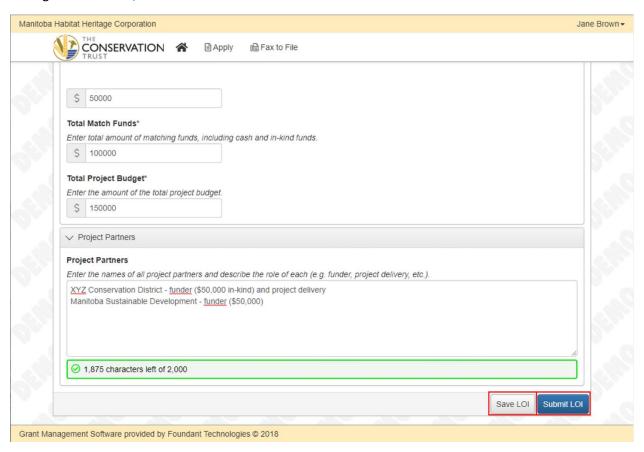
5. Complete all required and applicable optional questions.

NOTE: questions with text answers display the total number of allowed and remaining characters at the bottom of the text box.



6. When all questions are completed, click "Submit LOI" at the bottom right of the form.

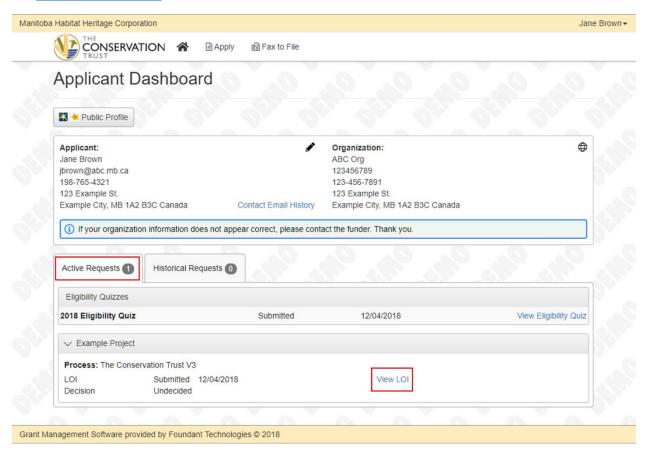
NOTE: the LOI will autosave continuously. The form can be closed and re-opened without loss of work at any point during the writing process. There is also a "Save LOI" button located at the bottom right of the form, beside the "Submit LOI" button.



7. After clicking "Submit LOI", you will be redirected to a confirmation page. You will also receive an email confirming that your LOI submission has been received. If you do not receive a confirmation email within 30 minutes, contact The Trust Team at CTInfo@mhhc.mb.ca or 1-833-323-4636.



- 8. After submitting your LOI, you will be able to view your LOI status under the Active Requests tab on your Applicant Dashboard (**NOT** on the Apply page). To view your submitted LOI, click "View LOI" under the Active Requests tab.
- 9. You will not be able to modify your LOI form after submitting it. If you wish to make changes to your submitted LOI before the submission deadline, contact The Trust Team at CTInfo@mhhc.mb.ca or 1-833-323-4636.



Application Form

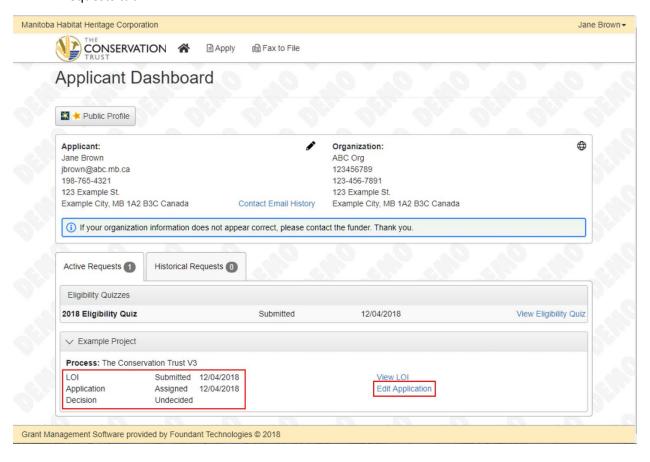
If your LOI is approved, you will receive an email inviting you to complete a full Application for Conservation Trust funding. To submit an Application, complete the following steps:

1. Log on to the Conservation Trust Online Grant Portal. Navigate to the Applicant Dashboard by clicking on the Home button.

NOTE: DO NOT navigate to the Apply page, as this will not give you access to your Application form. Clicking "Apply" on the Apply page will open a new LOI form.

2. Click "Edit Application" below "View LOI" on the Active Requests tab.

NOTE: you can view the status of your Application below the status of your LOI under the Active Requests tab.



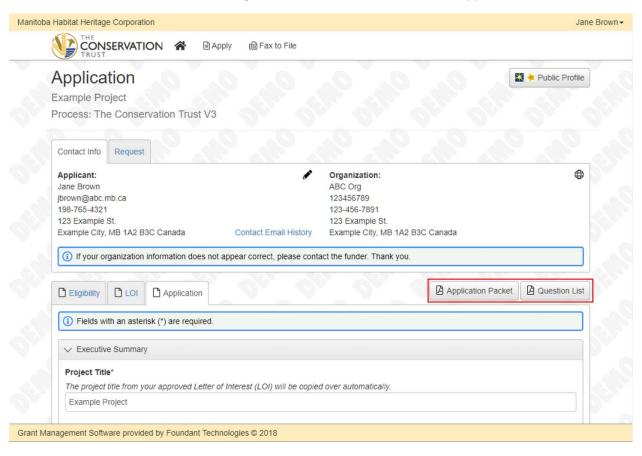
3. Complete all required and applicable optional questions on the Application form.

NOTE: all questions marked with an asterisk are required. You will not be able to submit your Application if any required questions are left blank.

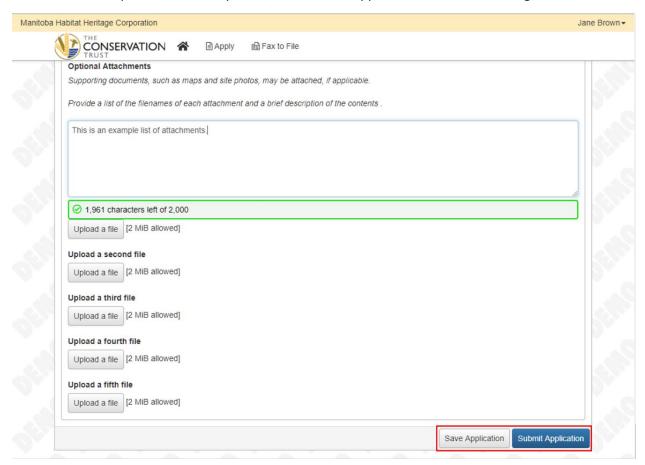
NOTE: the "Question List" button at the top left of the quiz allows you to download a PDF copy of the Application questions for offline reference. The "Application Packet" button allows you to download a PDF copy of the Application questions with your answers for offline reference.

NOTE: ensure all uploaded documents are in PDF format.

NOTE: The Application will autosave continuously. The form can be closed and re-opened without loss of work at any point during the writing process. There is also a "Save Application" button located at the bottom right of the form, beside the "Submit Application" button.

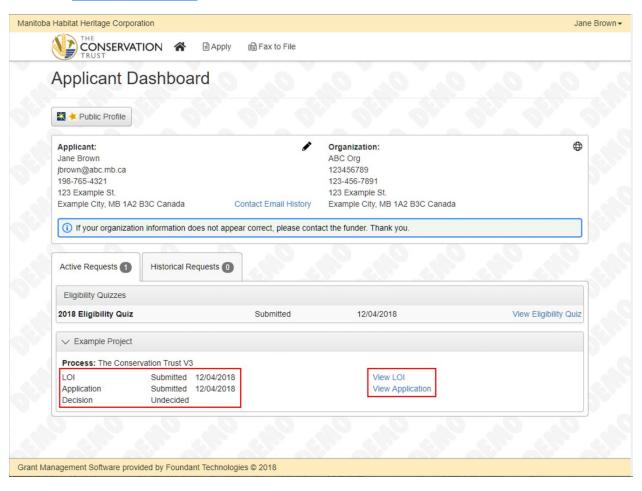


4. When all questions are completed, click "Submit Application" at the bottom right of the form.





- 6. After submitting your Application, you will be able to view your Application status under the Active Requests tab on your Applicant Dashboard (NOT on the Apply page). To view your submitted Application, click "View Application" under the Active Requests tab.
- 7. You will not be able to modify your Application form after submitting it. If you wish to make changes to your submitted Application before the submission deadline, contact The Trust Team at CTInfo@mhhc.mb.ca or 1-833-323-4636.

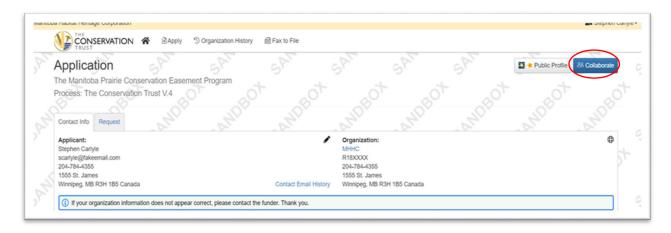


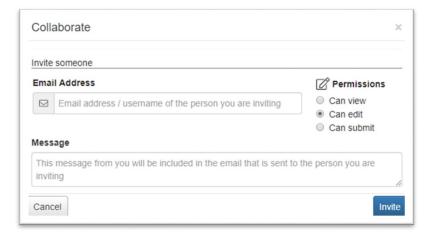
Collaborator

• To allow multiple people to work on the same proposal within the grant portal, Foundant has developed a Collaborate function. Using the Collaborate function is important if multiple people are editing the same application, as account and password sharing is not advised.

Note: Colleagues from the same organization cannot automatically see current or previous applications and you will need to invite them to collaborate.

• Once you have started a request you will see the blue Collaborate button at the right-hand side of the top of the page. This can be used to invite other people to work on this request.





From the Collaborate pop up:

- enter the email address of the person you would like to invite
- Set the Permission you would like the collaborator to have, either View, Edit, or Submit
- And lastly, include a message and select Invite

An email will be sent to the collaborator containing your message, their username, and a link to the logon page. After clicking this link the collaborator will be brought to the logon page. If this is their first-time logging into the system, they will be asked to create a password.

After logging into the system, the collaborator will see this request under the Collaboration Requests tab of their Applicant Dashboard. Here they can select the edit form link and start collaborating on the document.

- The Collaborator will have access to all forms within the request.
- This includes LOIs, Applications, and all Follow Up Forms that have been assigned to the original applicant.