Frequently Asked Questions

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MULTI-FACTOR AUTHENTICATION

Our organization uses a shared email address to access the portal. What should we do?
We recommend that each user has their own login credentials. You can set up your own account by completing the registration form, which can be accessed by clicking on the Register here button on the portal homepage. You may also contact grantsupport@pfs-llc.net for assistance.

The verification code isn't working.
Enter the code within 5 minutes of receiving it. If the code has expired, click the Resend Code button to get a new one. If the new code still does not work, close your web browser, reopen it, and reenter your login credentials to access the grants portal. You may alternatively use a different internet browser.

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LOGGING IN

I keep getting an error message when I try to log in or I see a different foundation's name in the top left corner.
Try to access the grants portal using a different internet browser, or clear your browsing history, cache, and cookies in your current browser. When you access the grants portal again, be sure that you are on the correct foundation portal - you should see the foundation's logo in the upper left corner of the screen. Be sure to manually log out of the portal when leaving the page to prevent technical issues.

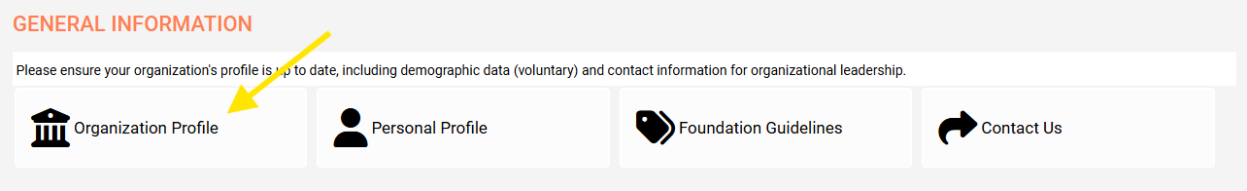
If you are still unable to log in, please contact the foundation's grants support admin, Ema Henry, at grantsupport@pfs-llc.net.

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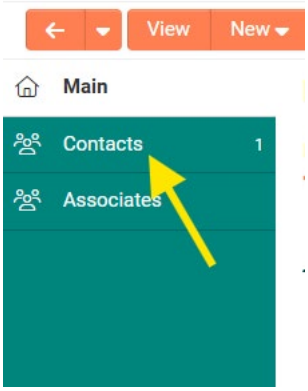
CONTACTS

How do I edit a contact who is already in the system?

1. Start by clicking on the link for your organization profile:



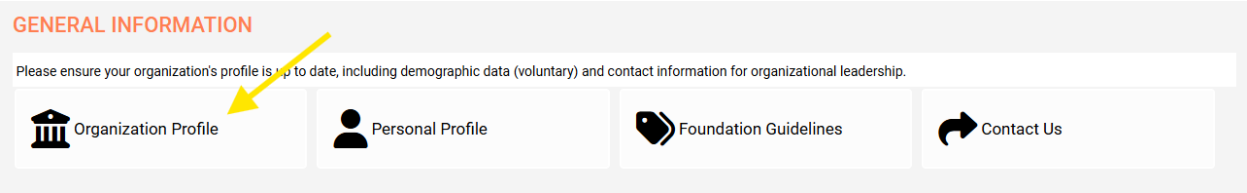
2. Click "Contacts" at the top left of your screen.



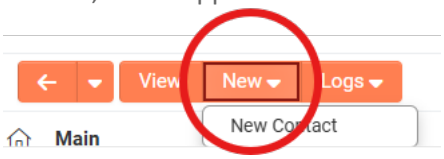
3. On the right side of the page, click on the "Edit" button (you will not be able to edit the contact's email address or organization name). If the contact is no longer working with your organization, you cannot delete them from our system. However, you can add *former* to their title (Former Development Assistant, for example) so our team knows that staff person is no longer with your organization.

How do I add the executive director or another staff person as a contact?

1. Start by clicking on the link for your organization profile:



2. Then, in the upper left hand corner, click on New and select Contact from the drop down menu:



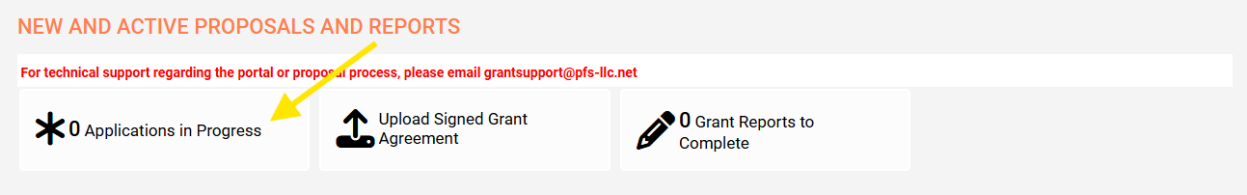
3. Using the new contact form, enter the contact's information.
4. Contact the foundation's grant support admin, Ema Henry, at grantsupport@pfs-llc.net to activate the new user's account.

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ACCESSING SAVED DRAFT

How do I access a saved draft I'm working on?

Click on the Applications in Progress icon on your home page:

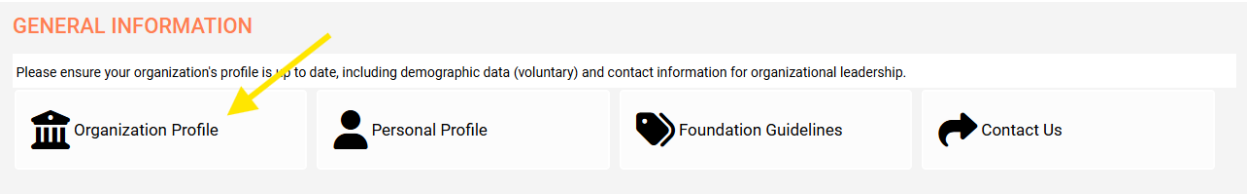


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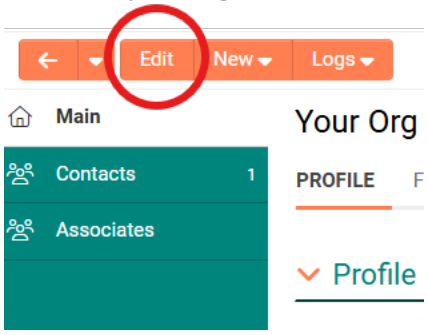
UPLOADING DOCUMENTS

Where do I upload my 501(c)(3) letter?

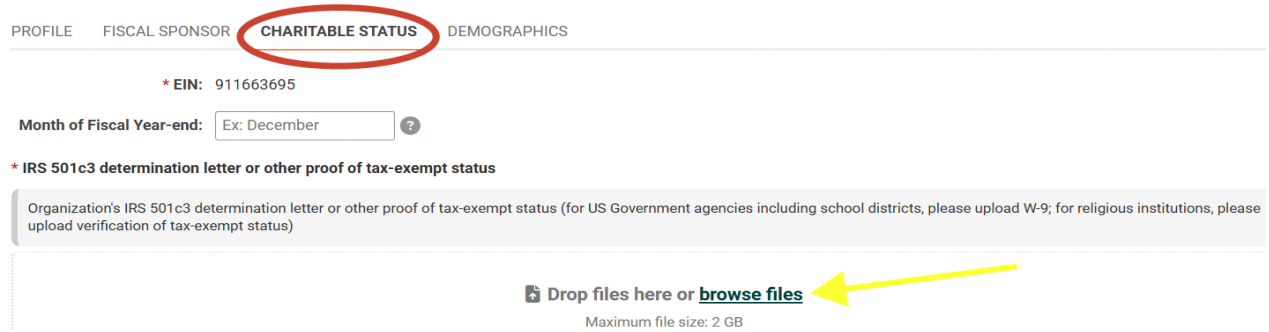
1. Your organization's 501(c)(3) letter should be uploaded to the organization profile. First, go to the Organization Profile from the home page.



2. Be sure that you are in the "edit" mode of your Organization Profile.



3. Select the tab titled "Charitable Status". Click the browse files link to open the file manager.

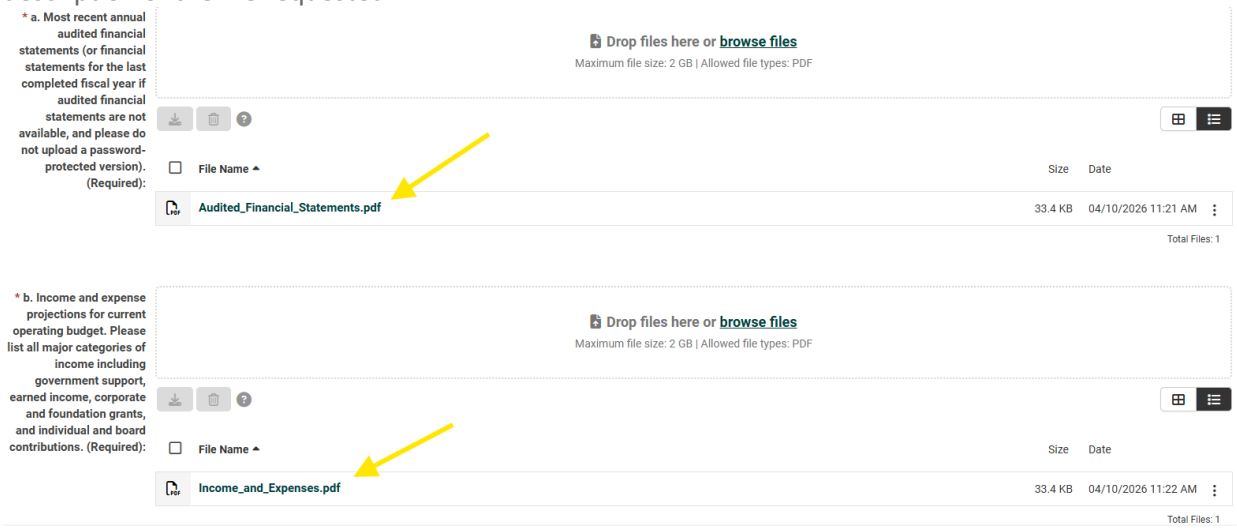


4. Upload the tax determination letter using the file manager. You can either drag and drop your file directly into the upload box, or you can click the browse icon to search for the file on your computer.

5. Once you have uploaded your letter, be sure to click "save" at the bottom of the screen.

I've uploaded all of the required documents, but I keep getting an error message when I try to submit, saying I haven't uploaded all the required documents.

1. Be sure to click "save draft" before submitting your final proposal. This will help the system recognize all uploads. If you click "save draft" and continue to receive an error message, double check that you have uploaded the files to the correct section. The documents should be uploaded to the area below the description of the file requested.

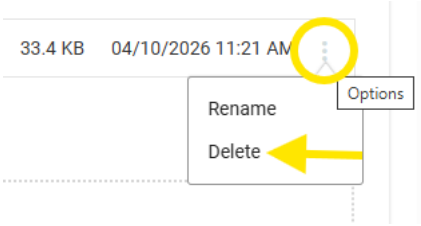


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DELETING DOCUMENTS

How do I delete a file I've uploaded?

1. You can delete a single file by clicking the three vertical dots on the right side of the uploaded document and choosing "delete".



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ADDING A GRANT WRITER

I am a grant writer for multiple organizations. How do I create a log in to submit proposals for each organization?

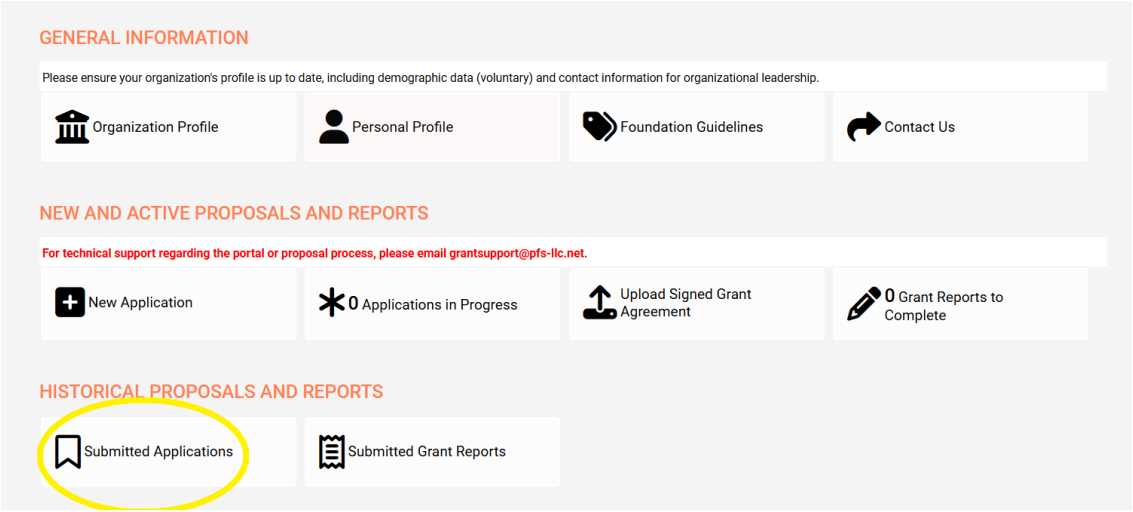
You can email the grant support admin, Ema Henry, at grantsupport@pfs-llc.net to help add you as a grant writer. An application will need to be created by the grant support admin each time you wish to apply. Be sure to include the organization name, tax ID, and the foundation whose grant cycle they are applying for in your email.

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ACCESSING PREVIOUS APPLICATIONS

How do I access a previous application that was submitted by my organization?

1. Click on the icon titled "Submitted Applications"



2. Click on the Printable Application button on the right side next to the grant application you wish to print
3. Click on "Export as PDF" button on the left side.

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UPDATING FISCAL SPONSOR

My organization has adopted a new fiscal sponsor or has become its own entity.

If your organization has recently changed its fiscal sponsor, please send an email to our grant support admin, Ema Henry, at grantsupport@pfs-llc.net with the tax ID of your organization, 501(c)(3) determination letter, the date the change was made, and the new fiscal sponsor's tax ID (if applicable).

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UPDATING AN EMAIL OR PASSWORD

I didn't get a confirmation email to reset my password after registering my email address or I missed the 24-hour window to create a password.

If you haven't received a link to create a password after 24 hours of registering your email, your email may have been misspelled during intake. Please contact our grant support admin, Ema Henry, at grantsupport@pfs-llc.net with details including the organization you are trying to register for and the email you will be using to access the portal. Our grant support admin will be able to update your email with the correct address and provide a temporary password to access the portal.

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