

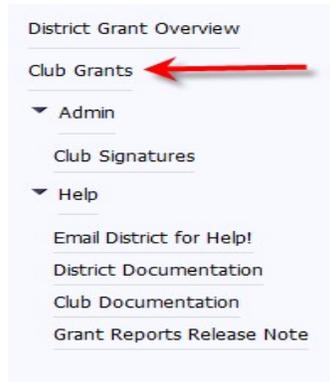
# ON-LINE GRANT MANAGEMENT

## ENTERING YOUR GRANT

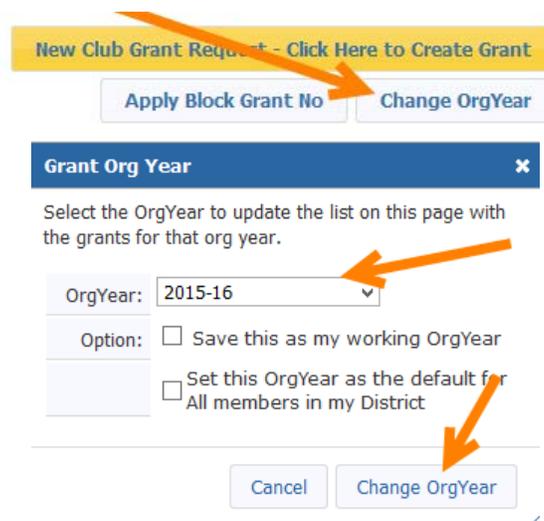
- The preparer of the grant must be a level 3 or higher to access the Grants tab. If the club member is not a level 3, please change them to a level 3 to work on the grant.
- Two club members need to sign off on the grant before it is submitted for approval. The club must be Grant Certified.
- Log into the District Database (make sure to use your club number when logging in; if you do not, you will not see any of the advanced tabs).
- Click on the Grants Tab



- Click on the Club Grants on the left side menu



- Change Org Year to 2017-2018



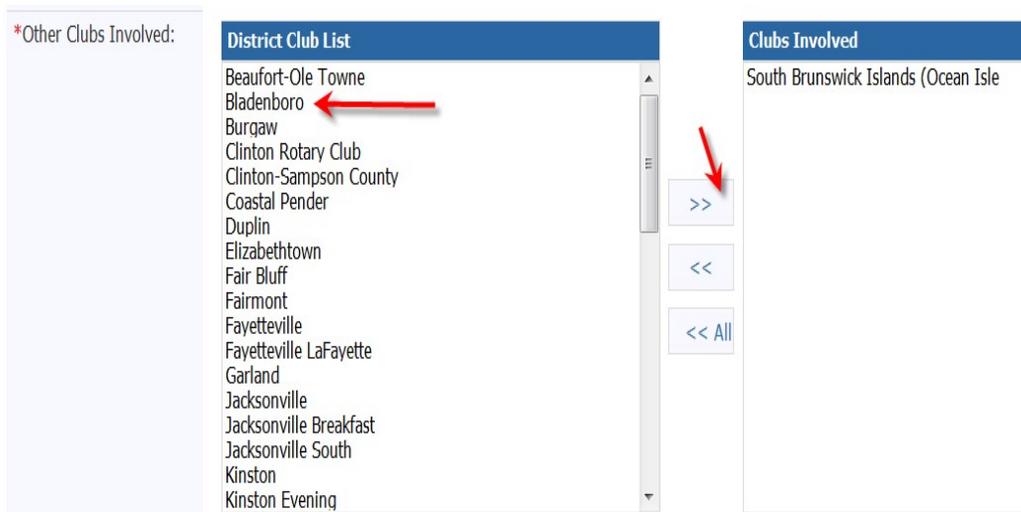
- Once the correct year is selected, click on New Grant Request



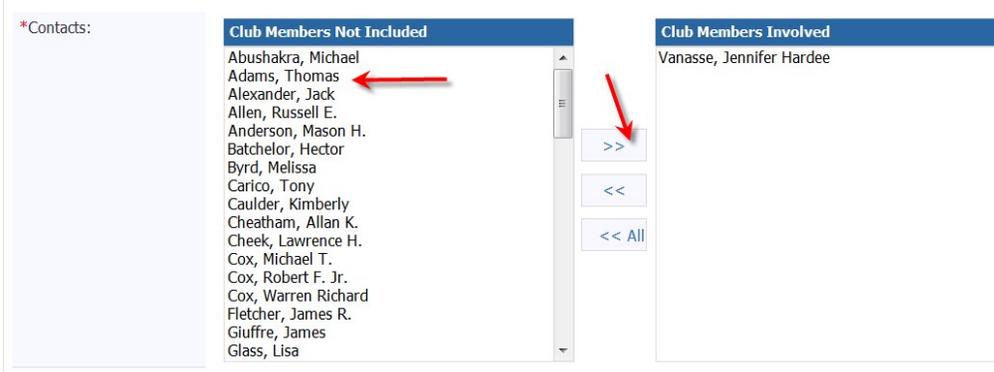
- There are three pages to complete on the New Grant Request
  - Details
  - Contacts
  - Application



- Details
  - This page contains general information about the grant.
  - Simply complete each field. Nothing can be left blank. If there is no answer, put "na".
  - Give a brief description regarding the project.
  - If there is more than one club involved in the project, you will move those clubs over to the right side of the page.
  - **IMPORTANT:** The Title of the Grant is limited to 30 characters including spaces. The Country is limited to 50 characters including spaces. The City is limited to 50 characters including spaces.



- **Contacts**
  - This is a list of the club members who will be working on the preparation of the grant and are responsible for collecting receipts, money, closure, etc. Simply move the names from the left to the right side. Two names are required. These individuals will be the signers of the grant.



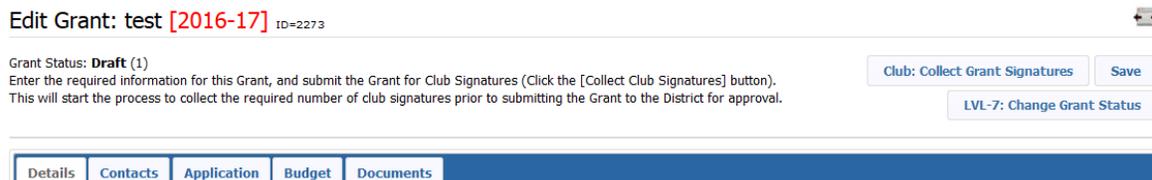
- **Application**
  - This page is the application itself. Each section must be completed and the two boxes at the bottom need to be checked. Please make as detailed as possible. The project objectives will automatically appear on the final report so be very careful when entering this information and make it as thorough as possible.



- Click on Save – You now have a draft grant



- A new member appears on the top of the page



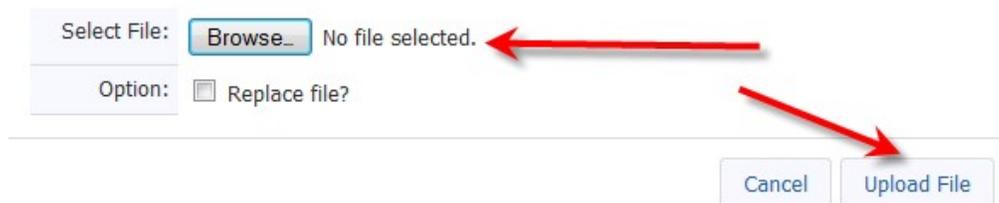
- A complete budget is required. Complete both the income and expense section. These will be adjusted with actuals when it is time to complete the Final Report.
- Funding should include all sources, including outside sources. Include name of the source and the amount you will be receiving.
- Expenditures should be itemized and include any estimated expenses for the project.
- If you have any letters of commitments, copies of quotes and other documentation, please upload them under the Document Tab.
- Click on the Document Tab



- Add documents by clicking on the upload file or add a folder and then upload files in the folder.



- Browse your computer for the file and click on add. Do not use any type of punctuation in the naming of your documents.



- At this point, SAVE your grant. You can never save too often!



- Double check all your work before you collect the signatures. You can always delete the grant at this point.

## SIGNING & SUBMITTING A GRANT

- Each club needs two signatures. If other clubs are involved with your grant, you need two signatures from each club.

- Signer one will click on edit grant (the pencil)

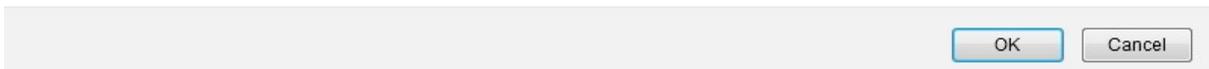
Action	Project Name	Proj No	Club	Status	Requested DDF	Approved DDF	Other Funding	Total Project Budget
 	TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Draft	\$1,000.00	\$0.00	\$0.00	\$1,000.00
Totals:					\$1,000.00	\$0.00	\$0.00	\$1,000.00

- He/she will click on Club: Collect Club Signatures

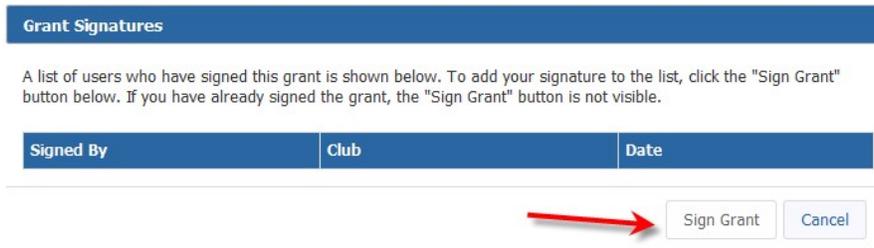


- The following message will appear

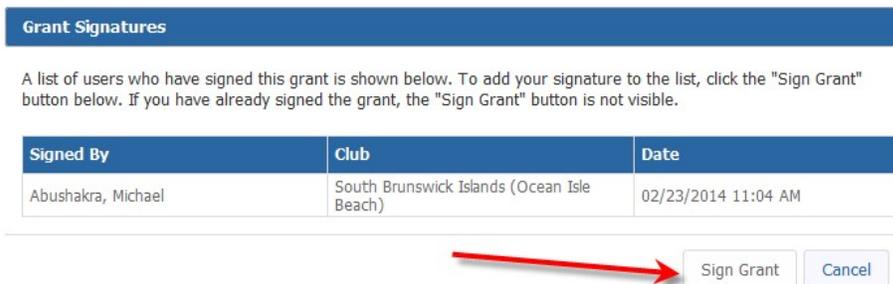
Please confirm - you are about to start the process to collect the club signatures on this Grant application. If you continue, the next step is for the Club to get the required number of signatures so the Grant can be submitted to the District for Approval. OK, to Continue?



- He/she will click OK. Then click on Club: Collect Club Signatures again. A new box will appear that says "Sign Grant"



- The second signer is now ready to sign the grant. They will follow the same steps as above. Edit the grant, click on Club: Sign Grant Application. The club signature box will appear again, but this time they will see the first signer's name and date on the box, then they will click on sign.



- The second signer will now submit the grant for approval.



- The status of your grant will now say “Submitted Grant for District Approval”

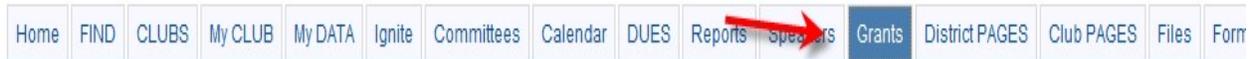
Action	Project Name	Proj No	Club	Status
	TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Submitted Grant for District Approval
				Totals:

- The District will now review the grant. You can no longer make any edits to the application. However, you can add additional documents to the grant and add information to the expense tab. You can also “revert back to draft” if you need to start over.
- If the District requires more information, you will receive a note from the District Grant Chair. The grant will be changed back to draft if additional information is needed. You can then add the additional information and re-sign the grant.
- Do not get frustrated – if you need technical assistance, contact Lin Kelly at [lin@linkelly.com](mailto:lin@linkelly.com) or 910-393-7154.

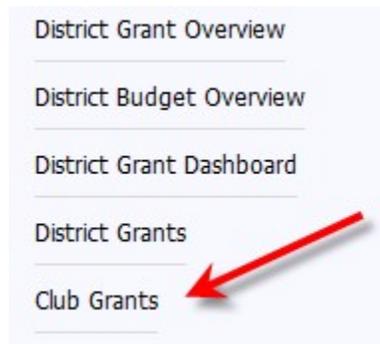
# GRANT FINAL REPORT

## COMPLETING THE FINAL REPORT

- Once you have completed the project you must complete an on-line Final Report to receive your funds
- Go to the District Database
- Click on the Grants Tab



- Click on Club Grants on left side menu



- Click on the edit button (pencil) of the grant you wish to complete.

Approved						
<input type="checkbox"/>	Action	Project Name	Proj No	Club	Status	Requested DDF
		Boys Girls Club Bus	29	South Brunswick Islands (Ocean Isle Beach) Southport (*)	Approved Grant	\$2,000.00
		test 2	412	South Brunswick Islands (Ocean Isle Beach)	Approved Grant	\$1,000.00
		TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Approved Grant	\$1,000.00
Totals:						<b>\$4,000.00</b>

- First, click on the budget tab and make sure you replace the information with actual funds and expenses. You must itemize each receipt and copies of the receipts must be uploaded in the documents.



- Scan photos of the project and Rotary involvement, all receipts and copies of any checks you may have disbursed and save them as “jpg” files and upload them to the Documents tab. THIS IS MANDATORY. If you need assistance, please contact Lin Kelly.



- Click on the Final Report Tab



- Our District will only use the Final Report
- Complete items 2, 4, 5 and 6. Items 1 and 3 are filled in automatically. You cannot leave any of this information blank.
- Your photos and receipts will automatically appear under the photo and receipt section if you saved them under documents as a “jpg” file. Contact Lin Kelly with questions.
- The Final Report must be completed by one of the two individuals in the club who prepared the grant request
- When you are finished with the Final Report, click on the “Save Final Report” to save your work.

Grant Status: **Approved Grant** (6)

This Grant is **locked** and you are unable to save changes in its current state. You may continue to add expenses, upload files and file reports.

This Grant is approved. When the Club is sent their funding check, mark the Grant as Funded.



- The two individuals who signed the grant request will need to sign the “Final Report”
- After you save the final report you are ready to sign it. The first Club Signer will click on the edit button, go to the Final Report and click on “Club – Collect Final Signatures”



- Then click on “Club: Sign Final Report”



- A new box will appear, click on sign grant

**Grant Signatures**

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date
Dixon, Lee Daniel Jr	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 12:08 PM
Vanasse, Jennifer Hardee	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:10 AM
Smith, Dale	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:59 AM
Abushakra, Michael	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:04 AM



- The second signer of the grant will now go to the database and click on the pencil to edit the grant. They will click on the “Club: Sign Final Report” button.



- The sign grant box will appear; they click on “Sign Grant”

**Grant Signatures**

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date
Dixon, Lee Daniel Jr	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 12:08 PM
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Smith, Dale	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:59 AM
Abushakra, Michael	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 11:04 AM
Abushakra, Michael	South Brunswick Islands (Ocean Isle Beach)	02/23/2014 02:23 PM



- The second signer will then click on “Submit Final Report”



- The status of your grant will now be changed to “Submitted final report for District Approval”

	TEST Grant #4	445	South Brunswick Islands (Ocean Isle Beach)	Submitted Final Report for District Approval	\$1,000.00
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- The audit committee will do an audit on the Final Reports. When that is completed, the District Foundation Chair and District Grants Chair will approve the grant. The Grant Treasurer will disburse your funds to you.