

Grants Management System for Humanities DC Grant Reviewers

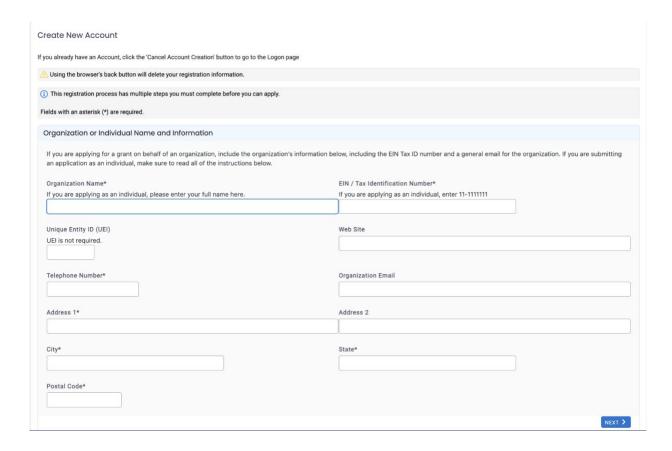
Creating a New Account

Step 1: Go to the **grants portal** and click "Create New Account". This grants portal is used by both reviewers and grant applicants.

If you have an existing account, use your email address and password to log in – **do not** create a new account. If you have forgotten or need a new password, click "Forgot your Password?" and follow the instructions to reset your password. See **Submitting the Reviewer Application Form** instructions below if you have an existing account (ex. you submitted a funding application) but have not reviewed grants for us before.

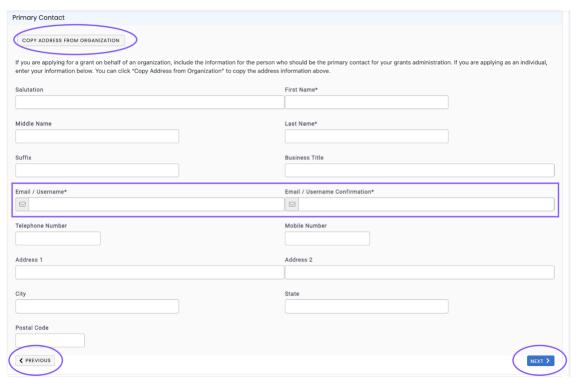
Step 2: Complete the registration form

After clicking "Create New Account," you will be directed to the registration page, which will guide you step-by-step through the creation process by asking for information about your account. Some questions may look strange because this registration page is the same for both organizations and individuals creating accounts. Since you're an individual creating an account, remember to enter your first and last name in the "Organization Name" field, and 11-1111111 in the EIN field.



Step 3: Enter your primary contact information

Since you are an individual, you only need to enter First Name, Last Name, and Email/Username. You may click "Copy Address from Organization" to copy information from the first screen. To edit previously submitted information, click "PREVIOUS." Using your browser's "back" button will cause you to lose all progress.

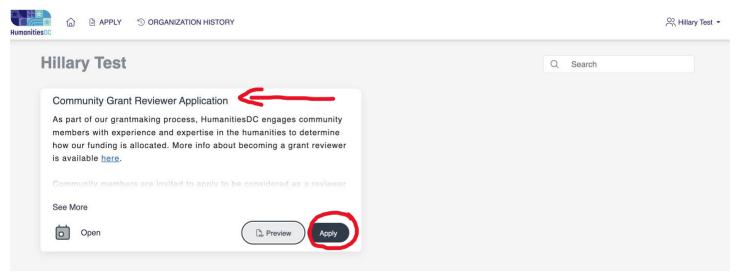


Step 4: Check off "Yes" for the Executive Officer question, even though you are creating an individual account not associated with an organization.

Step 5: Create a safe password and then create the account. Go through the email confirmation steps. We send emails through the grants portal, so it is key that you can receive them.

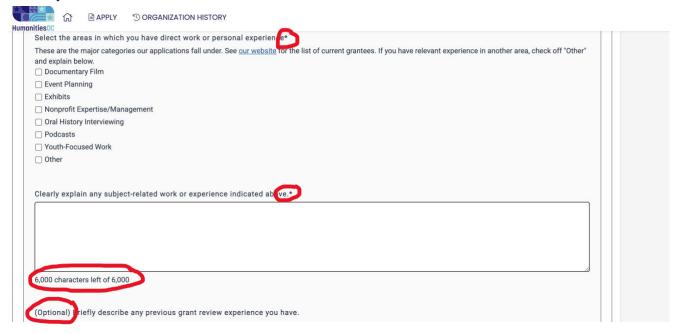
Submitting the Reviewer Application Form (for new reviewers)

Step 1: When you log into the grants portal, you will see the application page. This page will provide multiple application options, so make sure you focus on the *Community Grant Reviewer Application*. You can click "Preview" to view the application structure and questions before starting. Click the black "Apply" button to complete this application.



Step 2: Complete the application

The application consists of various input fields including multiple choice selections, list selections, and check boxes. Required questions have an asterisk (*) next to them. Narrative questions with text fields include character limits, and we ask for you to be as detailed as possible. You may wish to work on these narrative sections in a separate document before pasting them into the application form. Remember to save your progress if you are not ready to submit. Clicking the "Back" button on your browser will cause you to lose your work.



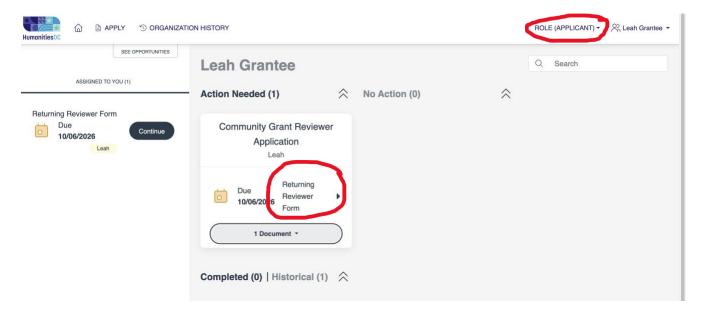
Step 3: Submit your application

Review your application ensuring that all required fields have been filled and click "Submit Application". You will receive an email confirming that your application has been submitted. HumanitiesDC grants staff will be in touch with further instructions and details

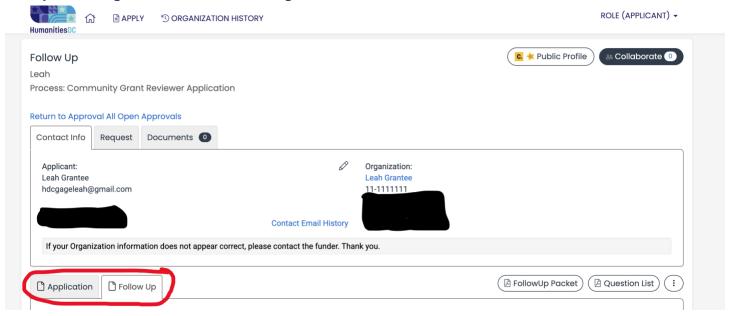
Submitting the Returning Reviewer Form

Step 1: Log into the **grants portal** using the same login you've used previously. If you have forgotten or need a new password, click "Forgot your Password?" and follow the instructions to reset your password.

Step 2: In the upper right, toggle the role to "APPLICANT". As you can see, the dashboard has been updated from previous years. You will see any HumanitiesDC applications that you have worked on, including the *Community Grant Reviewer Application*, which is what these instructions focus on.



Step 3: Click on the link for "Returning Reviewer Form". The form will automatically appear on your screen. To see your original intake form, click on the *Application* tab. If you do not see this form, email Hillary Steen at grants@humanitiesdc.org.

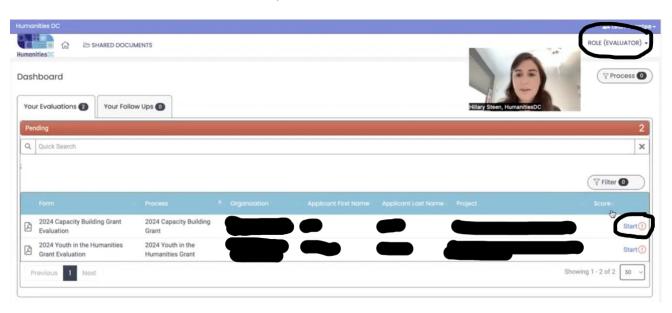


Step 4: Submit your form by clicking "Submit Follow Up" at the bottom of the form. If you are not ready to submit, save your progress by clicking "Save Follow Up".

Reviewing Applications

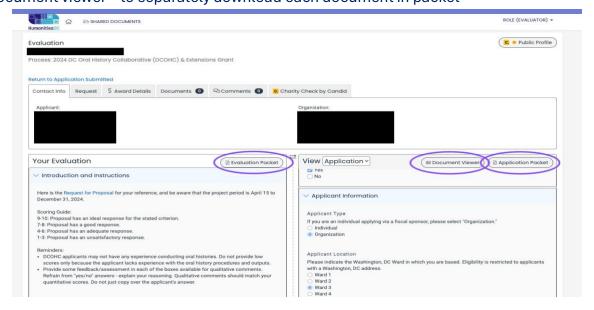
Note – Humanities DC staff will provide training on how to review applications. The instructions below focus on how to access them in the grants portal.

Step 1: If you are chosen to review applications, log into your account to reach your homepage. In the upper right, there's a toggle between *Evaluator* (to see your assigned applications) and *Applicant* (to see your reviewer intake form and any funding applications). Make sure you're in the *Evaluator* role for reviewing applications. **Before you start reviewing, you MUST submit a conflict of interest form**. More information about that will be emailed out by HumanitiesDC staff.



Step 2: Click the "Start" button to start reviewing a particular application. After you select a request to review, you will arrive at a side-by-side view showing the Evaluation Form you will complete on one side, and the Application submitted by the applicant on the other. Feel free to print out PDFs so you can have a hard copy to mark up, but the final evaluations must be in the grants portal. Other viewing options:

- Application packet to download a complete PDF file of the application
- Document viewer to separately download each document in packet



Step 3: Remember to save your evaluations! There is nothing to formally submit; if it's saved by the review deadline given by HumanitiesDC staff, we'll consider it done.