

Setting Up a Foundation Proposal Account Using Foundant Interface

A Guide for UNCG PIs

Background:

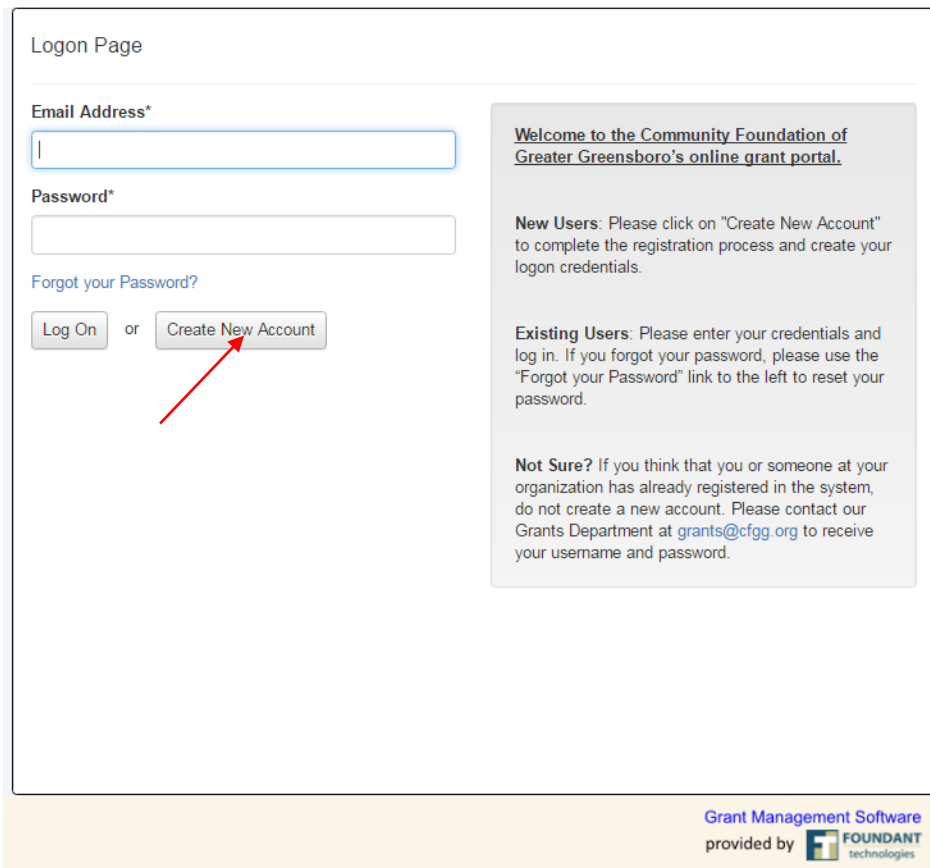
Foundant Technologies makes a very user-friendly grant application interface currently being adopted by many foundations (including CFGG, CFNC, etc). This interface is designed so that individual PIs have their own accounts. Because awards are made to UNCG, and Valera Francis, Director of OSP, is the Institutional Authorizing Official (and signatory), we want to ensure that the account is linked to the University.

Most PIs prefer to make the account on their own and load in the materials as they receive departmental and OSP review and approvals. **Prior to submission, your OSP Grants Specialist will ask you for your username and login so that we can review to application in the system before submission.** If you prefer, your Grants Specialist can make an account for you and upload the application. We can easily print the question list and send to you as you write your proposal.

Setting Up Your Account

Step 1 – Start!

Each foundation has their own version of this platform – even if you made an account with the Community Foundation of NC, it is different from the Community Foundation of Greater Greensboro! If you don't already have an account for the foundation you are applying to, Click "Create New Account" to start.



Logon Page

Email Address*

Password*

[Forgot your Password?](#)


or

Welcome to the Community Foundation of Greater Greensboro's online grant 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 or someone at your organization has already registered in the system, do not create a new account. Please contact our Grants Department at grants@cfgg.org to receive your username and password.

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Step 2: Enter Organization Information

Please enter the organization information as shown below.


Optional – for Organization Name, you can add your center/department/unit after “The University of North Carolina at Greensboro” (i.e. you can use “The University of North Carolina at Greensboro (UNCG) Center for New North Carolinians (CNNC)”)


Optional – You may use your center/department/unit website.

Leave all other fields as marked below so that any awards come to Valera in OSP

Create New Account

This registration process has multiple steps you must complete before you can apply.

 Using the browser's back button will delete your registration information.

 Fields with an asterisk (*) are required.

Organization Information

NOTE: You will not be able to change your organization information after registering.

Organization Name*

The University of North Carolina at Greensboro

EIN / Tax Identification Number (XX-XXXXXXX)*

56-6001468

Web Site

www.uncg.edu

Telephone Number (XXX-XXX-XXXX xXXX)*

336-334-5878

Organization Email

research@uncg.edu

Address 1*

1111 Spring Garden Street

Address 2

Suite 2601, Room 2702 MHRA Building

City*

Greensboro

State*

NC

Postal Code*

27412-5013

Country

USA

Cancel Account Creation

Next Step

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Step 3: Enter the PI Info

Enter the contact information for the lead PI. Be sure to update your email and phone. You can use your campus address or copy the Organization Address (OSP).

Create New Account


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⚠ Using the browser's back button will delete your registration information.

i Fields with an asterisk (*) are required.

Your Information

Prefix (Mr., Mrs., Ms., etc.)*	First Name*
<input type="text" value="Dr."/>	<input type="text" value="Rebecca"/>
Middle Name	Last Name*
<input type="text"/>	<input type="text" value="Libera"/>
Suffix (Sr., Jr., III, etc.)	Business Title*
<input type="text"/>	<input type="text" value="Grants Specialist"/>
Email/Login*	Email/Login Confirmation*
<input type="text" value="rclibera@uncg.edu"/>	<input type="text" value="rclibera@uncg.edu"/>
Telephone Number (XXX-XXX-XXXX xXXX)*	Mobile Number (XXX-XXX-XXXX)
<input type="text" value="336-334-4316"/>	<input type="text" value="336-303-8741"/>
Address 1*	Address 2
<input type="text" value="1111 Spring Garden Street"/>	<input type="text" value="Suite 2601, Room 2708 MHRA Building"/>
City*	State*
<input type="text" value="Greensboro"/>	<input type="text" value="NC"/>
Postal Code*	Country
<input type="text" value="27412-5013"/>	<input type="text" value="USA"/>


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Step 4: Answer "No"

You will designate Valera on the next screen.

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Executive Officer (Executive Director, CEO, President, Program Director, etc.)

Are you the Organization's Executive Officer?*

- Yes
- No

Previous Step

Next Step

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Step 5: Enter Authorized Official Information (aka "Executive Officer")

Please enter information as shown below. "Copy Address from Organization" will be helpful.

Create New Account


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i Fields with an asterisk (*) are required.

Additional Executive Officer Information

Prefix (Mr., Mrs., Ms., etc.)*	First Name*
<input type="text" value="Dr."/>	<input type="text" value="Valera"/>
Middle Name	Last Name*
<input type="text" value="T."/>	<input type="text" value="Francis"/>
Suffix (Sr., Jr., III, etc.)	Business Title*
<input type="text"/>	<input type="text" value="Director, Office of Sponsored Programs"/>
Email*	Telephone Number (XXX-XXX-XXXX xXXX)
<input type="text" value="vtfranc2@uncg.edu"/>	<input type="text" value="336-334-4919"/>
Mobile Number (XXX-XXX-XXXX)	Address 1
<input type="text"/>	<input type="text" value="1111 Spring Garden Street"/>
Address 2	City
<input type="text" value="Suite 2601, Room 2702 MHRA Building"/>	<input type="text" value="Greensboro"/>
State	Postal Code
<input type="text" value="NC"/>	<input type="text" value="27412-5013"/>
Country	
<input type="text" value="USA"/>	

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Step 5 – Set a Password

Create New Account

This registration process has multiple steps you must complete before you can apply.


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ℹ Fields with an asterisk (*) are required.

Password
Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#%&^&*()_

Password*

Confirm Password*

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Step 6 – Verify

After you “finish” on the last screen, check your email, then verify that you received an email from the foundation.

Step 7 – Store your information in a safe place!

Some of your OSP contacts like to securely store passwords in password managers like 1Password or lastpass. Whatever your method, make sure it is safe!

Step 8 – Share with your OSP Grants Specialist for review and submission.

They will need to log in to review and verify prior to submission. As policy, OSP is also required to submit your proposal. We will get verification from you *before* we submit. We’re here to help ensure a smooth submission and the best chance at a successful project!

Final Reminders!

Please, do not submit a proposal without first creating a Ramses file or without first allowing your Grants Specialist to review the proposal! We will submit the proposal on your behalf.

And remember, once you receive an award, Valera Francis, Director UCG OSP, is the person authorized to review and accept an award. Please forward any award document, terms, and conditions to her or your Grants Specialist.

Thank you!