Sand Hill Foundation

ONLINE APPLICATION PORTAL: FREQUENTLY ASKED QUESTIONS

REGISTERING

I am not sure if my organization or I have an existing profile in the grants portal. How can I check?

To prevent technical issues and duplicated organization profiles, please reach out to Darlington Martor. Darlington can be reached at dmartor@pfs-llc.net or at 415.561.6540 ext 293.

LOGGING IN

I've registered and set my password, but I keep getting an error message when I log in.

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 Sand Hill 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 reach out to Darlington Martor. Darlington can be reached at dmartor@pfs-llc.net or at 415.561.6540 ext 293.
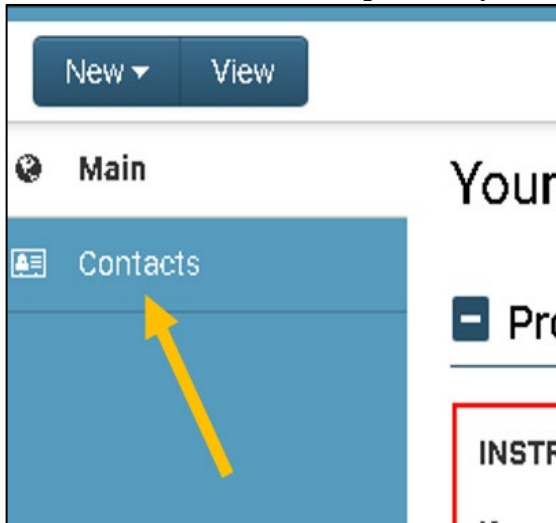
CONTACTS

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

Start by clicking on the link for your organization profile:


GENERAL INFORMATION

Organization Profile
Please ensure your organization and Director/CEO contact information is up to date.

Personal Profile
Please ensure your contact information is up to date.

Foundation Guidelines

Contact Us

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

2. 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 <u>cannot</u> delete them from our system. However, you can deactivate the individual which will alert our staff that this person is no longer with your organization.
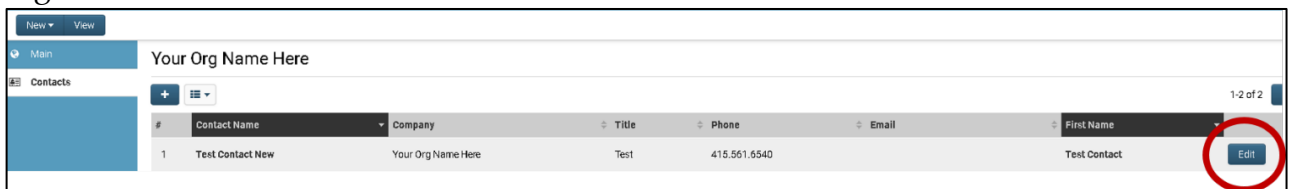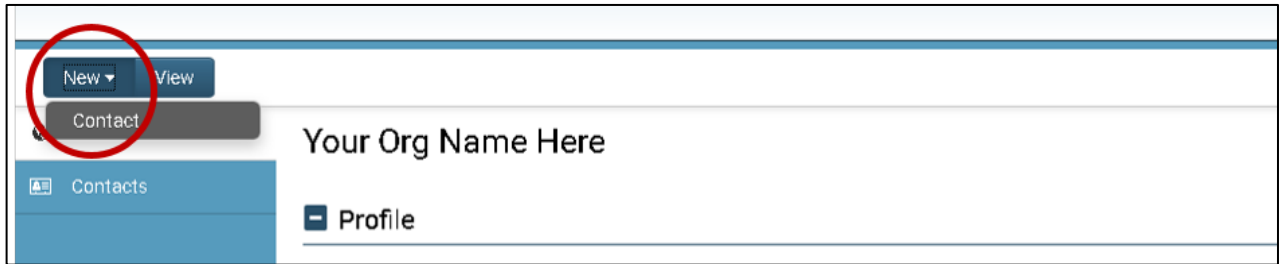

How do I add the executive director, or another staff person, as a contact?

1. Start by clicking on the link for your organization profile:
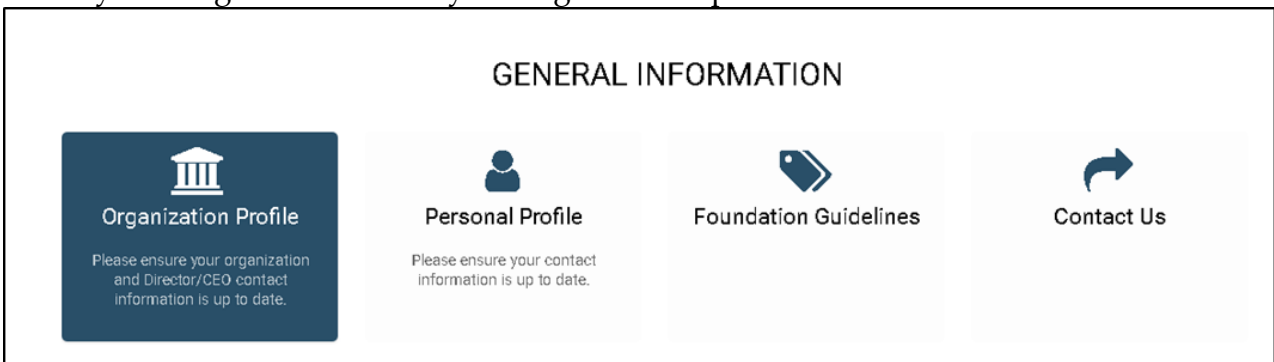
2. Then, in the upper left-hand corner, click on New and select Contact from the drop down menu:

3. Using the new contact form, enter the contact's information.

4. To activate the new user's account, so that this individual can access the applications and reports, please contact Rose Brookhouse. Rose can be reached at rbookhouse@pfs-llc.net or at 415.561.6540.

PROPOSALS

Why am I seeing so many draft proposals?

Each time you click the New Application icon you will automatically create a new draft of the application. Once you have started a draft, please always be sure to access it using the Applications in Progress icon, and not the New Application icon.

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

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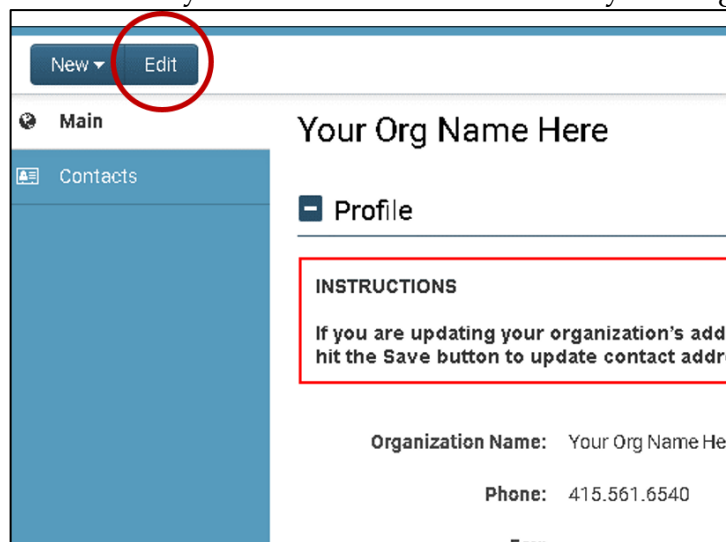

UPLOADING DOCUMENTS

Where do I upload my 501c3 letter?

Your organization's 501c3 letter should be uploaded to the organization profile, which means you won't need to upload it each time you submit a proposal.
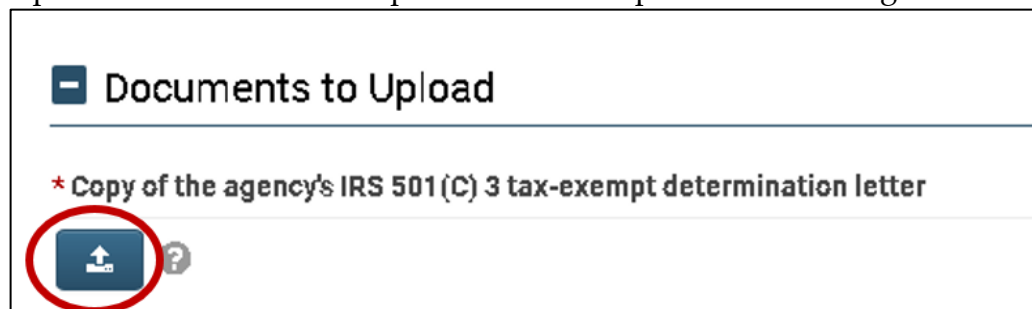
1. First, go to the Organization Profile from the home page:

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

3. Scroll to the bottom of your Organization Profile page until you see the Documents to Upload section. Click the upload button to open the file manager.


4. Upload the tax determination letter using the file manager. You can either drag or drop your file directly into the upload box, or you can click the browse icon to search for the file on your computer.
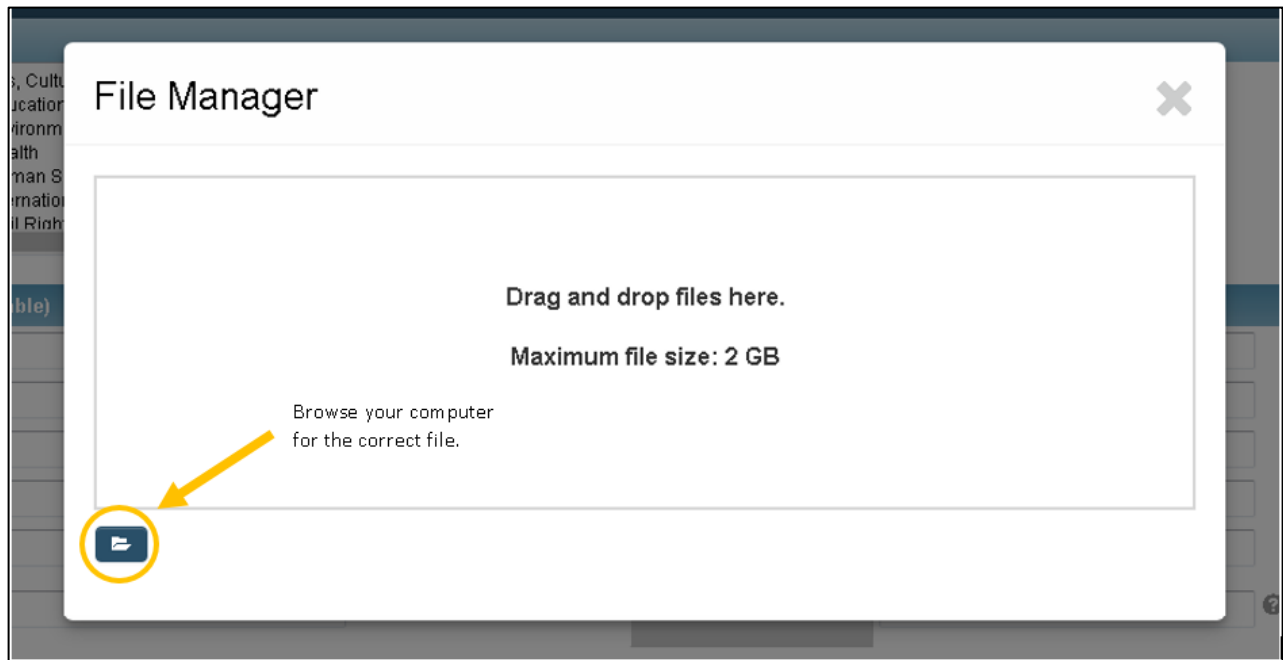
5. Once you have uploaded your letter, be sure to click "save" at the bottom of the screen.

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.

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.
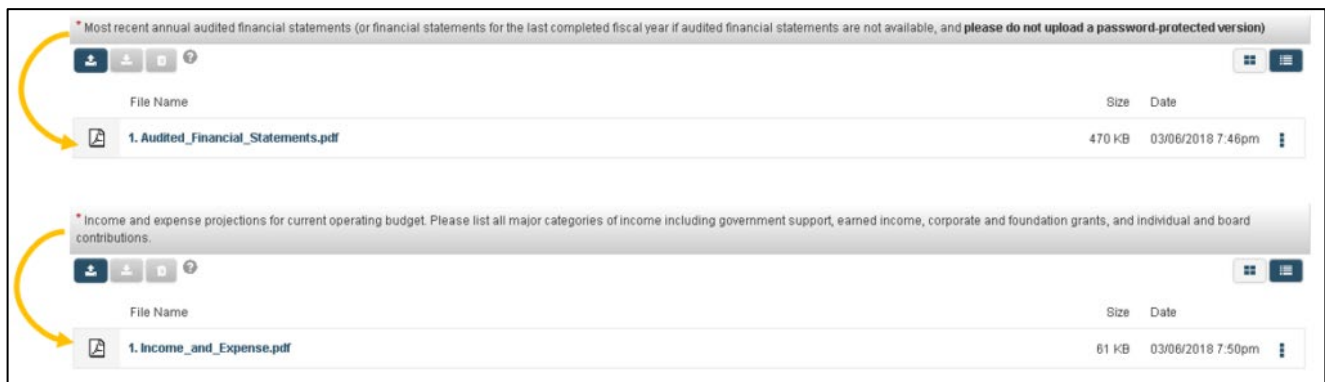
DELETING DOCUMENTS

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."
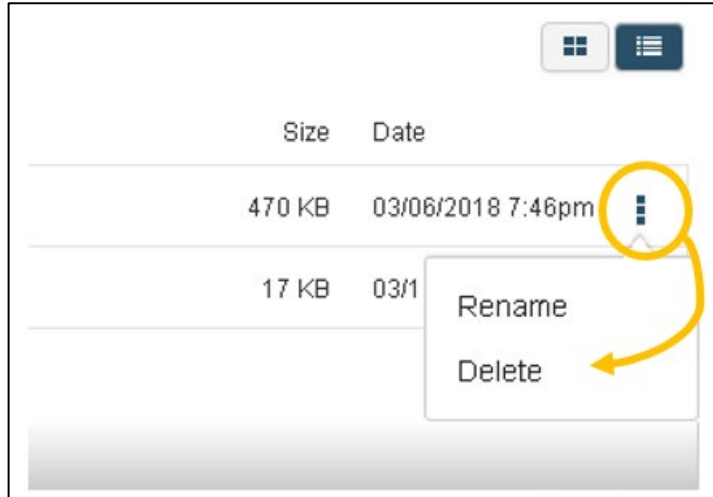
ADDITIONAL QUESTIONS

Should you have additional questions, please reach out to Darlington Martor. Darlington can be reached at dmartor@pfs-llc.net or at 415.561.6540 ext 293.