FAQ
Guide to Navigating
Online Forms

FAQ Guide to Navigating Online Forms

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## ONLINE APPLICATION & LETTER OF INTENT (LOI)

GUIDELINES

Before starting a Community Grant application, Major Grant Letter of Intent (LOI), or Signature Grant Letter of Intent (LOI), review **ALL guidelines** on PBF's website and, if needed, schedule a call with the Foundation at Foundation@Provident.Bank.

CHANGE OF INFORMATION

If there has been a change in leadership, change of address, or another change to your organization's contact information, please email the Foundation at Foundation@Provident.Bank so we can update our database.

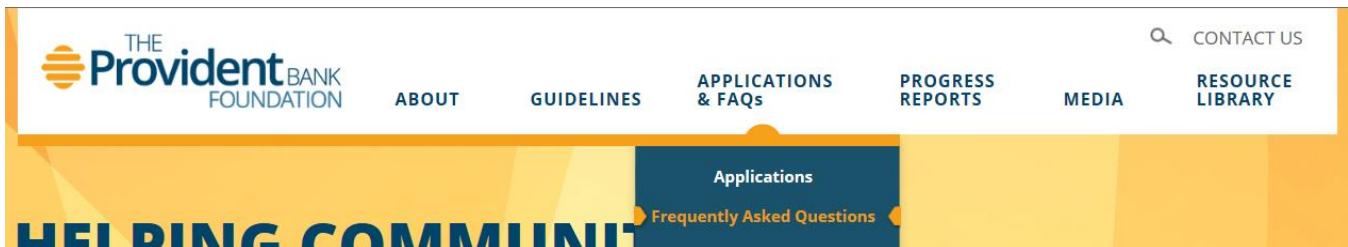### NAVIGATING THE PROVIDENT BANK FOUNDATION'S WEBSITE

- Click on the **GUIDELINES** tab and review all guidelines, rules, and requirements.
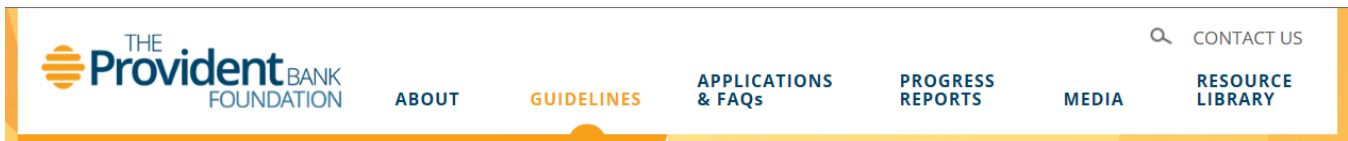
- Once reviewed and ready to start the application/LOI, click on the **APPLICATIONS & FAQs** tab, then select **Applications** from the menu.
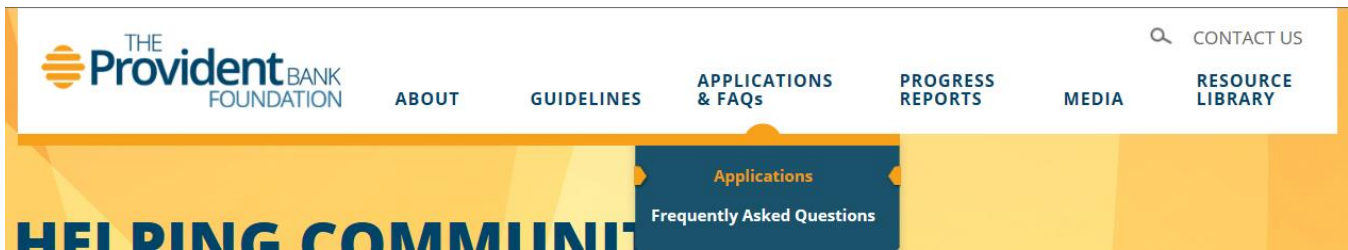
- If you have any questions, refer to the **Frequently Asked Questions** link in the menu.

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PREPARING TO APPLY

- It is imperative that you read through the IMPORTANT INSTRUCTIONS FOR SUBMITTING A REQUEST section prior to scrolling down to each grant opportunity link.

If you have already started an application/LOI and you would like to complete your draft, this link will take you to your Account Information Portal. You will need to log in using the email and password you created when you started the application/LOI.
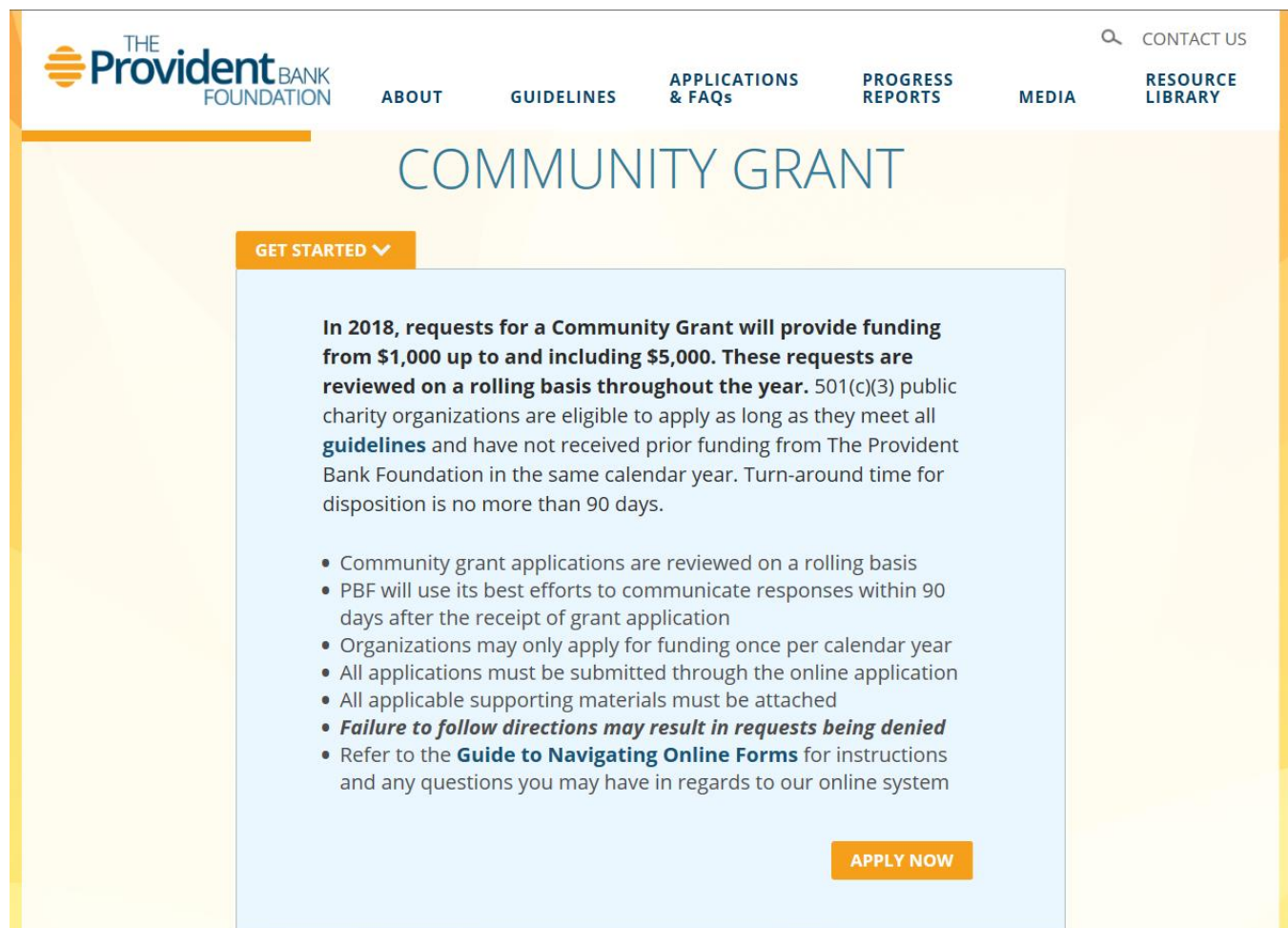
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- Links are provided to access each grant request – this includes the Community Grant application, the LOI for the current Major Grant cycle, and the LOI for the current Signature Grant focus area.

- Click on the **APPLY NOW** button under the **GET STARTED** tab for the grant you are applying for.

*IMPORTANT: Major and Signature Grant applications are by invitation only and can only be accessed with a unique link. Only if you have been invited to submit a formal application will the link be made available (by way of an email from PBF).

NAVIGATING THE ONLINE APPLICATION/LOI

Follow these instructions to learn how to sign in, apply, submit, save and retrieve draft applications.

*IMPORTANT about saving your application:

- To save your application as a draft, click on the SAVE DRAFT button at the bottom of the page.

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- Each time you save a draft, an email of your saved application will be sent to the email address associated with the Account Information Portal. You may add additional email recipients.

- Your account will time out after 45 minutes of inactivity. Any work not saved during that time will be lost.

LOGIN PAGE

Please Sign In

- If you are a new applicant, create an account by selecting "New Applicant?"

- If you forgot your password, click "Forgot Password?" before contacting PBF. Please remember to check your junk/spam folder. If you do not receive an email within 24 hours, please email Foundation@Provident.Bank and ask for your password to be reset. When you email PBF, please make sure you provide the correct email address associated with the account.

- Your email address must be associated with your 501(c)(3) organization.

Contact the Foundation | PBF Website | Exit/Log-Out

Please Sign In

- If you have an account, please log in using your e-mail address and password.
- If you are a new online applicant, please create an account using the **"new applicant" link** found below.
- If you have forgotten your password, click the **"forgot password link"** and it will be sent to you.
- If you have questions for The Provident Bank Foundation, contact us at Foundation@Provident.Bank.

E-mail

New Applicant?

Password

Forgot Password?

Login

Enter your Tax ID: This information can be found on www.Guidestar.org under the IRS Business Master File or in your organization's IRS Letter of Exempt Status.

Community Grant Guidelines | Contact Us | Guidestar FAQ | Exit

All organizations must be recognized by the IRS as a 501(c)(3) public charity organization under the Internal Revenue Code and are determined to be exempt, and which are classified as public charities and not "private foundations" under Sections 509(a)(1) or (2) of the code in order to receive funding offered by The Provident Bank Foundation (PBF).

If you have any questions regarding the Eligibility Quiz or your Tax Status, please review the Detailed Guidelines located on our website and visit www.guidestar.org.

Please enter your Tax ID: OK

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ELIGIBILITY QUIZ

You will be prompted to complete the Eligibility Quiz every time you sign in. Any questions about your organization's eligibility can be found on PBF's website under the Guidelines tab.

Organizations applying to PBF for funding must be recognized by the IRS as a 501(c)(3) public charity organization and be determined to be exempt, and which are classified as public charities and not "private foundations" under Sections 509(a)(1) or 509(a)(2) of the code.

Community Grant Guidelines | Contact Us | Guidestar FAQ | Exit

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ELIGIBILITY QUIZ

Organizations seeking funding from The Provident Bank Foundation must be determined as exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code and as an organization described in Section 509(a)(1) or 509(a)(2). Organizations must also work in one or more of three main categories: community enrichment, education, and/or health, youth and families.

1. What is your organization's reason for Non-Private Foundation status?
All organizations must be recognized by the IRS as a 501(c)(3) public charity organization under the Internal Revenue Code and are determined to be exempt, and which are classified as public charities and not "private foundations" under Sections 509(a)(1) or (2) of the code in order to receive funding offered by The Provident Bank Foundation (PBF).

-Select One- ▼

2. Is your organization located in New Jersey or Eastern Pennsylvania?

-Select One- ▼

3. In what New Jersey or Eastern Pennsylvania county is your organization located?

-Select One- ▼

4. Are you a religious organization seeking funding that benefits your membership or congregation only?

-Select One- ▼

5. Are you a political organization, including one that may be perceived as political or have portions of its program deemed political in nature by the Provident Bank Foundation?

-Select One- ▼

6. Have you received funding from The Provident Bank Foundation in this calendar year?

-Select One- ▼

7. If you have received funding from The Provident Bank Foundation in the last two years, have you submitted all required reports?

-Select One- ▼

Submit

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APPLICATION/LOI

Remember to review the Guidelines as well as the Assessment Criteria for the request you are submitting to help through the application/LOI.

    A.   You can click on each tab to move forward with the application/LOI, or to go back to a previous section.

    B.   Please reference the links under the PBF logo for any questions you have regarding the grant guidelines or to contact the Foundation.

    C.   If you need to print or email a draft of your application/LOI, please use the links provided on the form.

Attachments: Review the grant Guidelines to learn more about the required attachments. If you have any issue uploading documents, email the Foundation at Foundation@Provident.Bank.

- Our system accepts **PDF** documents only.
- Use the drop-down function to sync your documents with the corresponding attachment.
- Be sure to hit the **Upload** button after selecting the document.

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Review and Submit: Be sure all information is accurate and correctly spelled, that the certification page has been signed by management, and that all required documents have been properly attached. Click **SUBMIT Application**.

- Once the application/LOI has been submitted, you are unable to make any changes.

- A confirmation email from the system containing your complete application/LOI will be sent <u>immediately after submission</u> to the email address associated with the Account Information Portal.

- A second confirmation email will be sent from PBF. For Community Grants, allow five (5) business days for confirmation from PBF. For Major and Signature Grant LOIs and applications, allow 10 business days for confirmation from PBF.

- If you do not receive confirmation emails within the stated timeframes, return to your Account Information Portal (as described on page 3) to ensure your application/LOI was submitted.

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ACCOUNT INFORMATION PORTAL

ACCESSING YOUR ACCOUNT

To access your account in order to see DRAFTS and SUBMITTED APPLICATIONS, visit the Applications page on our website or click: https://www.GrantRequest.com/SID_1251?SA=AM.

You will be prompted to log into your account using the email address and password associated with the Account Information Portal.

Once logged in, a new screen will appear (shown below). This page defaults to **In Progress Applications**. This is where you can access your application DRAFTS.

Account: samantha.plotino@provident.bank | Change E-mail/Password
Last Log in: 12/28/2017 11:21 AM GMT-05:00

Contact the Foundation | PBF Website | Exit/Log-Out

Applications | Requirements

Applications

For access to **submitted or draft** applications, select "Submitted Applications" from the **show drop-down** menu on the right side of the page.

Show In Progress Applications ▾

☐ Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Sample Application Name	Sample Project Title	1234.00	1234	05/15/2014		

IN PROGRESS (DRAFT) APPLICATIONS

Transferring a draft application: Click on the people icon to transfer an application. A prompted email will appear to send to the person who will be taking over the application.

Account: samantha.plotino@provident.bank | Change E-mail/Password
Last Log in: 12/28/2017 11:21 AM GMT-05:00

Contact the Foundation | PBF Website | Exit/Log-Out

Applications | Requirements

Applications

For access to **submitted or draft** applications, select "Submitted Applications" from the **show drop-down** menu on the right side of the page.

Show In Progress Applications ▾

☐ Hide Viewer Only Applications

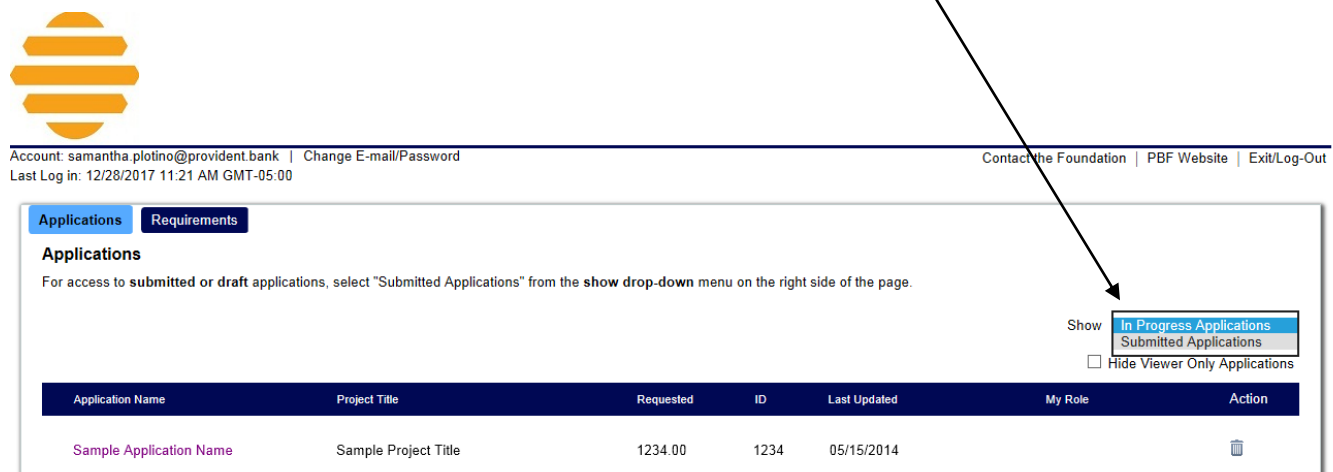| Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Sample Application Name	Sample Project Title	1234.00	1234	05/15/2014		

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Transfer to new owner

*Your Name	
Your E-mail	samantha.plotino@provident.bank
*E-mail		Check Email
*Subject	Application Ownership Transfer

Memo to New Owner:

```
Dear Grantee,
This message is to notify you that ownership of
Application «Application_ID» has been transferred to you. You
must accept transfer of ownership in order to complete this
process.
Please login to complete the application.  You can login to your
account, «Account_Login_URL», at any time.
NOTE: If you are a new user, a separate email will be sent to you
with the login web page and your initial password. For security
reasons you will be asked to change the password when you first
log in.
```

Maximum (5000) characters
* Required

Transfer   Cancel

Deleting a draft application: Click on the trash can icon to delete an application. A pop-up will appear to confirm you want to delete the application.

Account: samantha.plotino@provident.bank | Change E-mail/Password   Contact the Foundation | PBF Website | Exit/Log-Out
Last Log in: 12/28/2017 11:21 AM GMT-05:00

Applications   Requirements

Applications
For access to **submitted or draft** applications, select "Submitted Applications" from the **show drop-down** menu on the right side of the page.

Show In Progress Applications ☑
☐ Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Sample Application Name	Sample Project Title	1234.00	1234	05/15/2014		

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Sharing a draft application: Click on the envelope icon to send a copy of the application. A prompted email will appear to send to the person who will be reviewing the application.

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SUBMITTED APPLICATIONS

Once you click the SUBMIT Application button, you are able to review it in your Account Portal. However, once submitted, no changes can be made to the application. Submitted applications cannot be deleted. The only functions allowed are to transfer or share the application.

After submitting an application/LOI, you will receive two (2) confirmation emails: one sent <u>immediately after submission</u> from the system containing your complete application/LOI, and the second directly from PBF. For Community Grants, allow five (5) business days for confirmation from PBF. For Major and Signature Grant LOIs and applications, allow 10 business days for confirmation from PBF. If you do not receive confirmation emails within the stated timeframes, return to your Account Information Portal (as described on page 3) to ensure your application/LOI was submitted.

To see your submitted applications, select **Submitted Applications** in the "Show" drop-down menu.

Transferring a submitted application to a new owner: Click on the transfer icon, as shown below. This will bring you to a prompted email to send to the person who will be taking over the application.
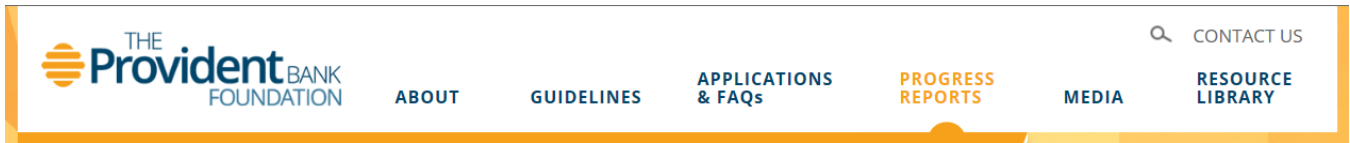
![The Provident Bank Foundation logo]

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Transfer to new owner

*Your Name	[ ]
Your E-mail	samantha.plotino@provident.bank
*E-mail	[ ] Check Email
*Subject	Application Ownership Transfer
Memo to New Owner	Dear Grantee,

Dear Grantee,
This message is to notify you that ownership of Application 36441
has been transferred to you. You must accept transfer of
ownership in order to complete this process.
Please login to complete the application. You can login to your
account, «Account_Login_URL», at any time.
NOTE: If you are a new user, a separate email will be sent to you
with the login web page and your initial password. For security
reasons you will be asked to change the password when you first
log in.

Maximum (5000) characters
* Required

Transfer   Cancel

Sharing a submitted application: Click on the envelope icon to send a copy of the application. A prompted email will appear to send to the person who will be viewing the application.
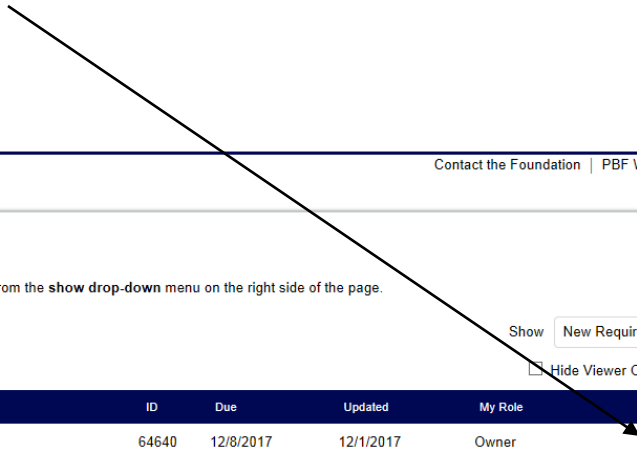
Account: samantha.plotino@provident.bank | Change E-mail/Password   Contact the Foundation | PBF Website | Exit/Log-Out
Last Log in: 12/28/2017 11:21 AM GMT-05:00

Applications	Requirements

Applications

For access to **submitted or draft** applications, select "Submitted Applications" from the **show drop-down** menu on the right side of the page.

Show   Submitted Applications ▾

☐ Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Submitted	My Role	Action
TEST Application	Test application #2	1	36441	10/31/2017	Owner	

THE
Provident BANK
FOUNDATION

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Send E-mail

*Your Name	
*Your E-mail	samantha.plotino@provident.bank
*Recipient E-mail(s)	

To send to multiple e-mail recipients, separate e-mail addresses with commas. A maximum of 10 recipients is allowed.

*Subject	Copy of Application
Message	I would like to share the attached Submitted Application with you.

Maximum (5000) characters
*Required

Send me a copy ☐

[Submit] [Cancel]

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PROGRESS REPORTS

ACCESSING YOUR ACCOUNT

To access your Progress Reports (also known as "requirements"), click on the **PROGRESS REPORTS** tab or go to https://www.GrantRequest.com/SID_1251?SA=AM.

You will be prompted to log into your account using the email address and password associated with the Account Information Portal.

Once logged in, a new screen will appear (shown below). This page defaults to **New Requirements**. To navigate between New Requirements, In Progress Requirements, and Submitted Requirements, use the "Show" drop-down menu.

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NEW REQUIREMENTS & IN PROGRESS REQUIREMENTS

Transferring a requirement: Click on the people icon to transfer a requirement. A prompted email will appear to send to the person who will be taking over the application.

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Sharing a requirement: Click on the envelope icon to send a copy of the requirement. A prompted email will appear to send to the person who will be reviewing the application.

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SUBMITTED REQUIREMENTS

Once you submit your requirement you are able to review it in your Account Portal. However, once submitted, no changes can be made to the requirement. Submitted requirements cannot be deleted.

After submitting your requirement, you will receive two (2) confirmation emails: one sent immediately after submission from the system containing your complete requirement, and the second directly from PBF. Allow five (5) business days for confirmation from PBF. If you do not receive confirmation emails within the stated timeframes, return to your Account Information Portal (as described on page 3) to ensure your requirement was submitted.

To see your submitted applications, select **Submitted Requirements** in the "Show" drop-down menu.

Transferring a submitted requirement to a new owner: Click on the transfer icon, as described on page 16. This will bring you to a prompted email to send to the person who will be taking over the requirement.

Sharing a submitted requirement: Click on the envelope icon to send a copy of the requirement, as described on page 17. A prompted email will appear to send to the person who will be viewing the requirement.