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ONLINE APPLICATION INSTRUCTIONS

In addition to applying for a grant, the online system also allows you to review your organization's grant history, check due dates, fill out and submit Evaluation Reports, track the grant application status of open requests, and edit and update your organization's contact information.

When applying, you do not have to complete your application in one session. You can save it as a draft and access it repeatedly before submitting. During this time, your application remains in **DRAFT** status, even if you have answered all required questions and uploaded all required files, until you click on the **Submit Application** link. At that time, the status changes to **SUBMITTED** and you will receive a confirmation email. **Please do not forget to click Submit Application when your application is complete as we do NOT consider applications in DRAFT status.** You can periodically review the status by logging into your organization's account.

If your application is not completed correctly, or additional information is needed, foundation staff will move the application back to DRAFT status and advise you, via the email provided during registration, that additional work is required. You must **re-submit your corrected application before the due date provided in the email** in order to be considered; this could be a very short turn-around. Therefore, **please make sure the email used during registration is regularly and frequently monitored.** It is advisable to complete the application a couple of weeks before the due date to allow time to re-submit, if needed. If your organization's application is not qualified, it will be rejected and you will be advised via email.

Shortly after the board meeting (in mid-June or mid-December), you will be notified of the outcome via email; this will also be posted online to your account. If approved, the check will be sent with an Award Agreement Letter, which has to be signed by the chief executive officer and uploaded to your account.

Organization Registration and Log On

The first time an organization makes an online application, the organization has to register and set up an account to create the organization's profile. It is very important to **register an organization only once**, regardless of how many users there are and how many applications are submitted by the organization over time and by different people, in order to maintain a complete history of grants and requests for the organization. **If, after checking with your development department, you are still unsure if your organization already has an existing account, or if you need to be added to the account, please contact foundation staff.** It is also very important to enter all organization information accurately during registration, because after this point, the organization profile can only be edited by foundation staff.

Here is the link to the online system; you might want to bookmark the page:

https://www.grantinterface.com/kleberg/common/logon.aspx

The initial registration process has these steps:

- Logon Page – click Create New Account.
- Organization profile information – enter the organization's full name as it appears on the IRS Determination Letter, the EIN/Tax ID number, and organization address.
- Individual user information – the email entered here will become the account ID and will be used by foundation staff to communicate with your organization, so please make sure it is an email that is regularly monitored and available to all who need to access the online application.
- Chief executive officer information. The chief executive officer is the President, CEO or Executive Director of the organization who is able to legally bind the organization. For institutions of higher education or medical schools, this is the Provost, VP-Research, or President.
- Password – this will become the account password and should be given to everyone in your organization who is allowed to access the online application system.
- Confirmation Page – this screen asks you to check if you received a confirming email from the foundation, and to confirm this by clicking 'Yes.' **This check is very important** as it ensures that the email provided is valid and that emails from the foundation are not blocked by the organization's firewall.

During the registration process, you cannot save partial information; therefore, you should gather all required information before beginning the registration process.

Once the account is set up, returning users log on to the system using the account email address and password created during the initial registration. If the organization, in later years, is applying for another grant, this same email address and password must be used to log on, so please keep it safe. There is a system prompt to assist if you forgot the password.

Applicant Dashboard

After you have registered you will be directed to your Applicant Dashboard. There are 4 buttons going across at the top:

1. **Home Symbol** – clicking on this any time brings you back to your Dashboard where you can check the status of your grants. The Dashboard also lists organization and applicant information, which you can edit here. You can also download completed application forms; see the status of an open application form you have submitted; whether or not a grant has been awarded; and complete required follow-up forms for awarded grants, for example when an Evaluation Report is due. If you have saved but not yet submitted an application, you must access the application on this page to complete and submit the application.
2. **Apply** – clicking here lists all open applications. If there is not an open application cycle, the box will be blank. The spring cycle is open February 1 – March 31, the fall cycle is

open August 1 – September 30; you can only apply during these times. Make sure you click on the correct application link: the 'Medical Research Study Application' for medical research requests, OR 'General Grant Application' for all other requests. Clicking on the application link opens the Application screen. You can print a list of the application questions by clicking on 'Question List' at the top right of this screen. Fill out your application. Be sure to **follow all instructions** within the application.

3. **Organization History** – this brings up the organization contact information and the application and grant history. Any projects listed under the 'Legacy Data' Process have only limited information. After 2015, you can access the full application, payments, follow-ups, etc. for a project.
4. **Fax To File** – takes you to a new page with instructions and a link to a tool for converting hard copy pages to a PDF file or combining multiple documents into a single file. You can download converted documents to your computer and then upload them into your online application when needed. When finished, close that page to return to your account.
   - Select 'Request a Fax #' – a toll-free number will appear on the page.
   - Load a document, or multiple documents that need to be consolidated into one file, into your fax machine.
   - Dial the toll-free number. Send a separate fax for each individual file you wish to create.
   - Select 'Finished Faxing' when you are done, and to see your list of files.

Uploading Files

In general, the acceptable file types for uploading files are: Microsoft Word/Excel and Adobe PDF (PDF) files. Only one file can be uploaded per question; multiple documents for one question must be combined into one file and then uploaded.

To **upload a file**, click the 'Upload a file' button to locate the file on your computer, select the file and then click the 'Open' button. Once an attachment is uploaded, a red 'X' appears beside the file name. You can delete an attached file by clicking the red 'X' beside the file name.

Project Budget Template

You **must use the foundation's project budget template** for your application to be considered. To download the project budget template, click on the link in the budget section of the application and select the file that applies to your type of request. Complete the project budget template form (revenue and expenses) and other funder information (separate tab), and be sure to save it to your computer as you will use this file again to report actuals with your Evaluation Report, if your request is approved.

Helpful Tips

- Start and complete your application early to allow time for correspondence with foundation staff, potential problems with uploads, or having to edit and resubmit your application.
- The character limits include spaces as well as characters.
- You can type text directly into the application or you can copy text from a Word document or other file and paste it into the application. This is particularly helpful for lengthy application questions. If you prepare your application in this way, be sure to keep track of character limits.
- The system automatically saves your work as you enter data, but it is advisable to also regularly save your work.
- A user will automatically be logged out of the online system after 90 minutes of inactivity. The user will receive a warning message and your work will be saved.
- It is advisable to download copies of all submitted forms to your computer for your own records.
- **If you do not provide an answer for one of the required questions or do not upload a required file, you will not be able to submit your application.**
- If your PDF upload file exceeds the maximum file size, consider using the Adobe Acrobat option to 'Reduce File Size.'
- Once your application has been submitted it is no longer available for editing. If you need to make a correction to a submitted form, contact foundation staff.
- Foundation staff can be reached via email at margretb@alexventures.com or on Margret's cell at 210-316-8398 if it is an emergency.
- **Remember to click 'Submit Application' when you are finished.**