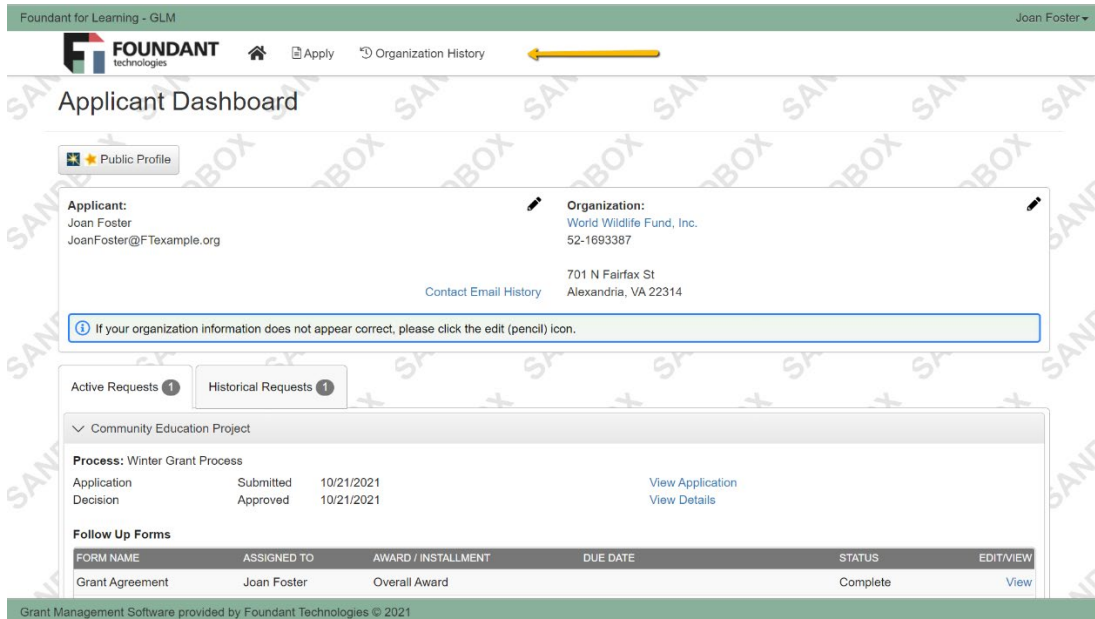## Applicant & Grantee Dashboard
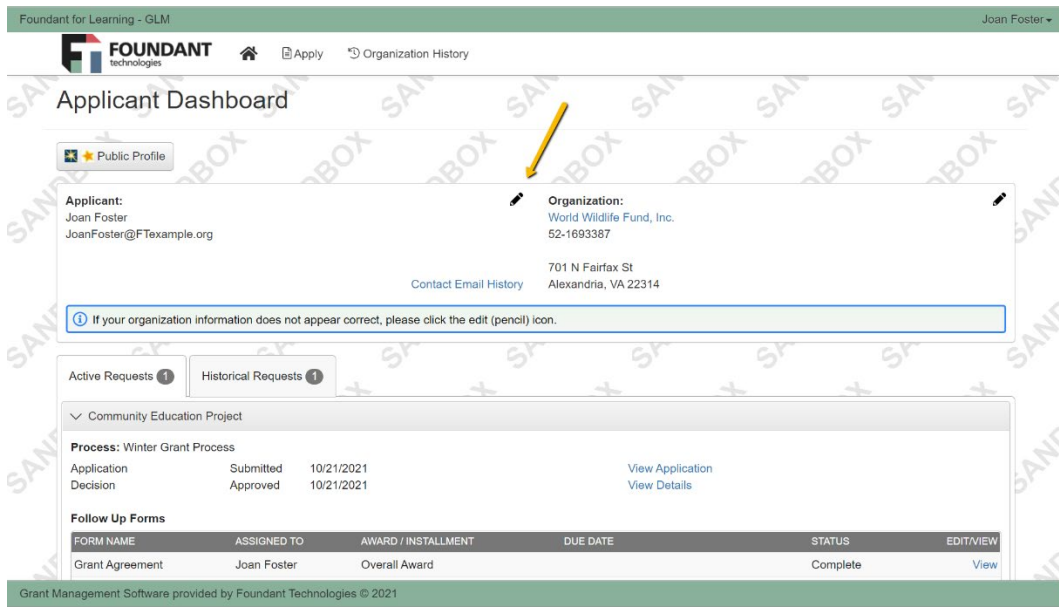
Upper Navigation Bar

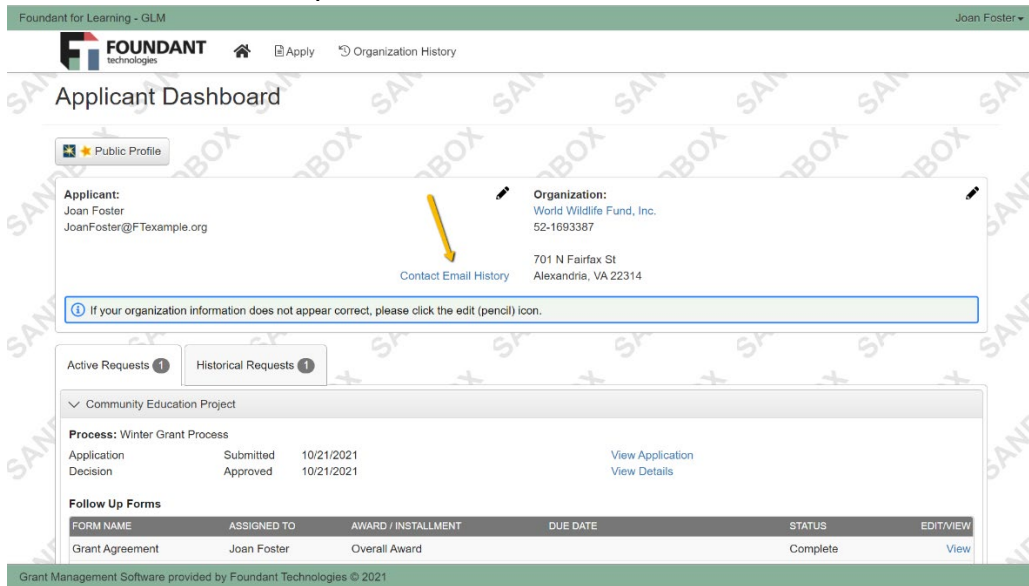There are several actions an applicant can take from the upper navigation bar:

- Click **Home** to navigate back to their dashboard.
- Click **Apply** to navigate to the Apply page, where they can start a new request.
- Click their **Name**, where they can log out, edit their profile, or edit their organization information (if applicable).
- Click **Organization History** to view other requests submitted by an applicant from their organization, any organization documents made available by an administrator, and other general information.

Contact Information Section

The contact information section displays the applicant's contact information, and their organization's contact information (if applicable). Clicking the *Pencil* icon next to either section allows the applicant to edit the information. The applicant's ability to edit their organization's information is controlled in your site settings (more details can be found here: Applicants' Ability to Edit Organization Information).

Clicking *Contact Email History* shows the applicant a record of emails sent to them through the system (both automatic and manually sent emails), which also allows them to view the body of those emails for reference.

Clicking **Public Profile** allows the applicant to view publicly available information about their organization from GuideStar and GreatNonprofits. More details are provided when they click this button.

Request Section

The request section of the applicant dashboard contains two tabs: *Active Requests* and *Historical Requests*.

The *Active Requests* tab is open by default and displays all open requests from the applicant. Here they can view forms they've already submitted, edit those they haven't yet submitted, and view details about the decision on a request (the visibility of these details depends upon your site settings: Show Decision Status and Award Details).

Documents uploaded to your folder will be available here under, "Documents Uploaded by Administrator".

- To begin working on completing a report assigned to you under Follow Up Forms, click the *Edit* link in blue to begin.

- To view a report that you submitted, click the *View* link in blue. Once you submit you can't make changes.

- To preview a report that is assigned to you click the *Preview* link in blue.

- You will know when a report is marked complete by the Grants Officer because the status column will change to "Complete".

- The system will not allow you to begin working on your next report until all previous submissions were marked "Complete".

The *Historical Requests* tab displays requests from the applicant that have been closed, denied, or abandoned. The applicant can view submitted forms for those requests as well.