



# ONLINE GRANT APPLICATION ACCOUNT SETUP GUIDE

Please use these basic instructions for creating your account and accessing our online grant applications. Contact the Foundation with any questions.

**1** Visit the applications page of our website at [polkccf.org/applications](https://polkccf.org/applications) and click on the “Grants Portal” button or go directly to [polkgrants.communityforce.com](https://polkgrants.communityforce.com).

**2** At the Login screen, click on the “Create New Account” button.

The screenshot shows the login interface for the Polk County Community Foundation's Grant Application Portal. On the left, there is a 'Login' section with input fields for 'Email' and 'Password', and buttons for 'Login', 'Cancel', and 'Create New Account'. A 'Forgot Password?' link is located below the password field. On the right, there is a 'Welcome' message and instructions for 'New Applicants/First Time Users', 'Existing Applicants', and 'Forgot Password'.

**3** Choose your organization’s name from the drop-down list (contact us if you don’t see your name). Enter your name, phone number, and email address, and choose a password. Click the “Submit” button to register.

**Note:** the first person setting up the account will be assigned as a **Primary User/Member** of your organization. This should be the head of your organization, such as an Executive Director, President/CEO, Board Chair, County/Town Manager, etc. See the reverse side for more details about different types of users.

**4** Once you’ve created your account, you’ll be able to log in with your new user ID (email address) and password.

**5** After logging in, look for the correct application (e.g. 2024 First Quarter Grant Application) and click on the “Apply” link. You can start a new application by giving it a name and clicking on the “Apply” button.

## HAVE QUESTIONS OR NEED TECHNICAL SUPPORT?

Contact Noah Wood, Director of Grants at [grants@polkccf.org](mailto:grants@polkccf.org) or **828-859-5314**

# USER DEFINITIONS & INFORMATION

- **Primary User** - A Primary User has full access to their organization's account. They can create user accounts for other members of the same organization from the Manage Members screen and can update their own name and the organization name from the view/edit profile screen. They also have the ability to view all the applications submitted by different users within their organization and can transfer Application Ownership.
- **Non-Primary User** - Non-Primary Users of the organization can only update their own name from the view/edit profile screen. They do not have access to the Manage Members screen, cannot view applications submitted by different users in the organization, and cannot transfer Application Ownership.
- **Managing Members** - Organizations can use the Manage Members feature to link its users together and assign additional Primary Users that can access all applications from all users from their organization. After a Primary User of an organization logs into their account they can create accounts for all members of their organization as Primary or Non-Primary users, and assign Active or Inactive status.  
▶ [Click for Help Guide](#) ▶ [Click for Video Help](#)
- **Active/Inactive** - Please \*do not\* delete user accounts. When someone leaves your organization and you no longer want that person to have access to their account and applications, the Primary User should change the former user's status to Inactive. Deleting their account will remove all history and any application forms they created will not be available. Inactive users will no longer be able log into the system and they will not receive system emails, but their past work will be accessible.
- **Collaborator** - Collaboration allows you to invite other people to help complete specific sections of your application. The Collaborator must have a user account in the system to be able to work on an application. If the Collaborator does not have an account, you can create one for them before adding them as a Collaborator on your application. An email will be sent to that person notifying them that their account has been created. If you assign a section to be completed by a Collaborator you will still be able to view that section to see how it was completed. ▶ [Click for Help Guide](#)
- **Application Owner** - Each application is "owned" by the user who created it. The Application Owner or another Primary User of the organization can change ownership of an application from one user to another. Note: Once ownership has been changed, the new owner can log in and access the application form as needed, but the prior owner will no longer be identified with that application form and will not be able to access it. ▶ [Click for Help Guide](#) ▶ [Click for Video Help](#)



[CLICK HERE](#) for a 2-minute overview video on how to create your account.



[CLICK HERE](#) for a 20-minute Training video that reviews how to **1)** create your account, **2)** Manage Members, and **3)** change Application Ownership.