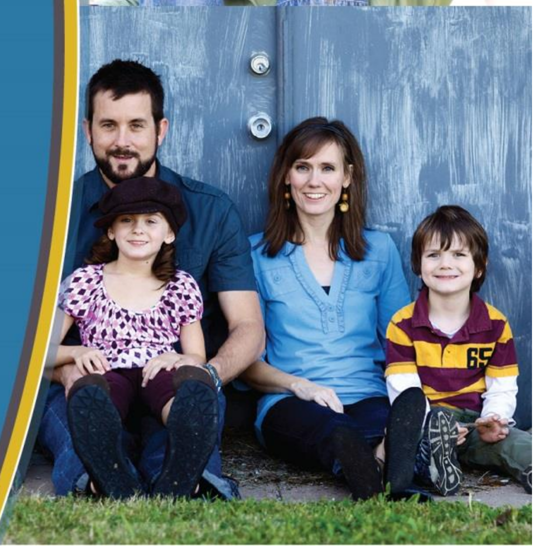
COVERED
CALIFORNIA

Navigator Grant Application System

Step-by-Step Tutorial



Application Tips

General Reminders

- If the applicant does not click the “Yes” for a final submission before 5pm on 3/21/14, the application will not be considered as an on-time submission.
- Throughout the application there will be sections where a document or attachment must be uploaded. In each section you will find information on any relevant file requirements.
- The online application allows the applicant to cut and paste into the online application from a word document. Applicants are encouraged to draft their work in Word and transfer the final narrative content into the application. See example below.

Allowed Types: **Microsoft Word** (.doc or .docx), **Adobe Acrobat** (.pdf). File must be uploaded as a single document, and must be less than 50 MB.

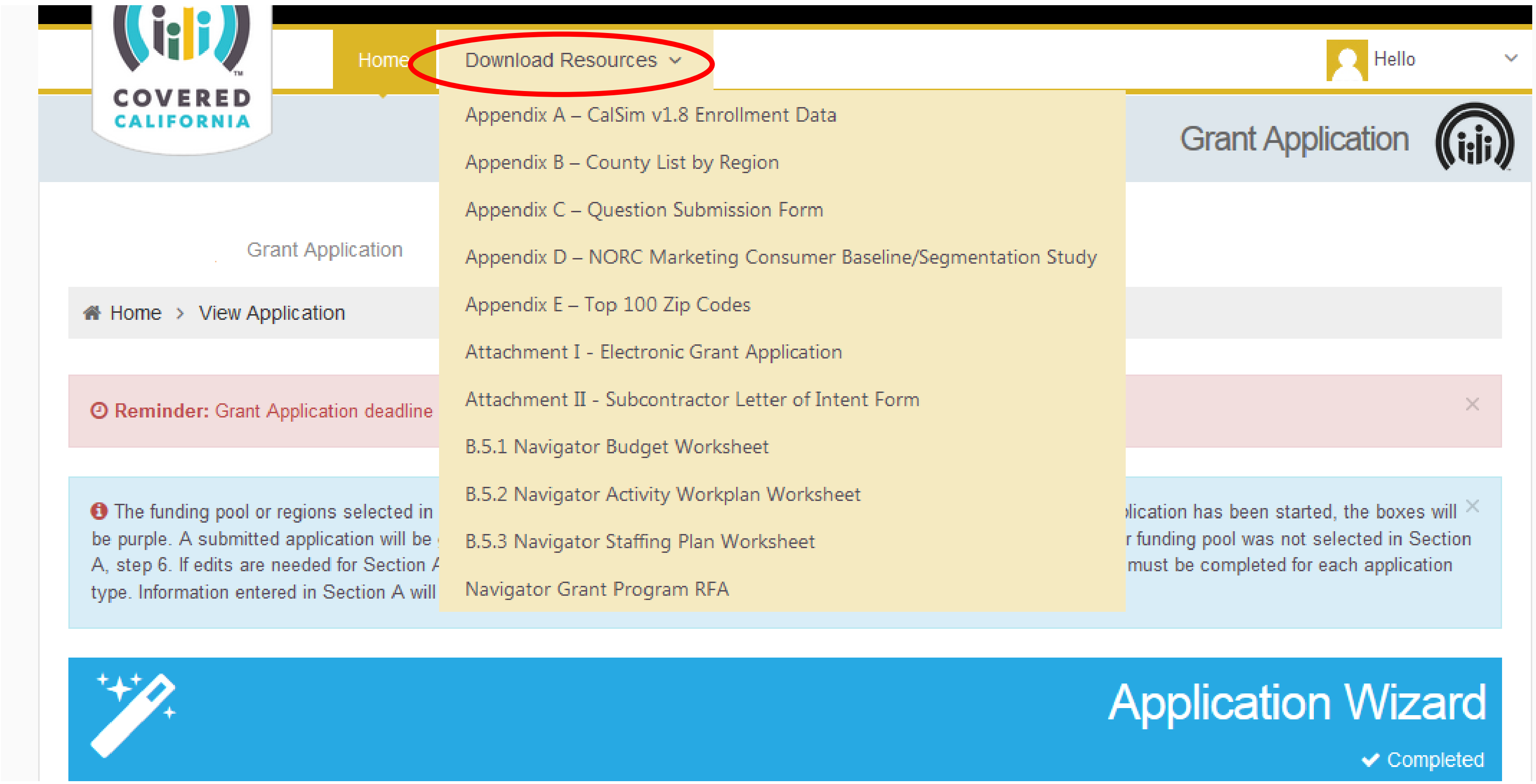
Documentation of Eligibility includes:

- IRS Determination Letter of your organization's 501(c)3 or 501(d) status, if applicable.
- All entities must provide Federal Tax Identification Number and any corresponding status determination on official letterhead
- All entities must provide most recent Form 990 or Tax Return

Upload file

Application Resources

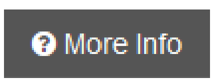
- All of the relevant grant application documents are available for you to download in the top menu.



Symbols and Icons

Throughout the application, you will see a variety of symbols and icons. If you're unsure about an icon, hover over it. You'll see a tip appear over it that gives you more information. Here are a few of the common ones:

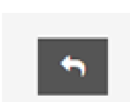
The red "information" symbol indicates that there is an important instruction or additional information. Keep an eye out for instructions just below the toolbar.



Throughout the application, you'll see "More Info" boxes in the upper right corner of the screen. For information about what is required in the section, click the icon for details.

*

A red asterisk indicates that the field is required.



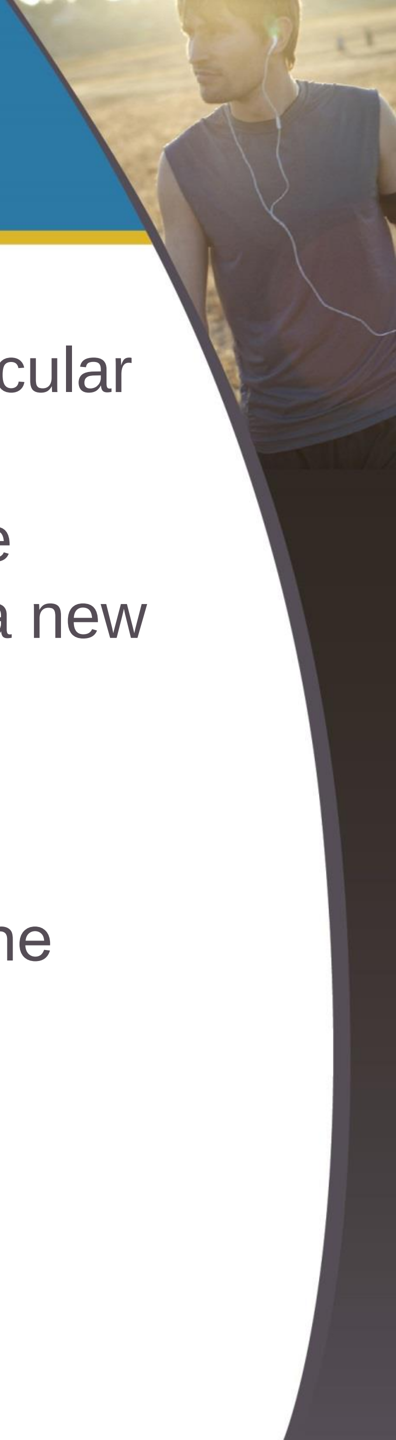
The "go back" arrow indicates an opportunity to return to the previous screen.

Helpful Information for Section A

BEGIN APPLICATION | 1 ORGANIZATION INFORMATION | 2 PRIMARY CONTACT | 3 ORGANIZATION ENTITY TYPE | 4 APPLICANT EXPERIENCE | 5 ADDITIONAL FUNDING | 6 REQUESTED FUNDING | 7 SUBCONTRACTOR INFORMATION | APPLICATION SUMMARY

- The progress bar shows your movement through the application
- Each step of Section A is displayed in the circles across the top of page
- The circles will turn green once the step is complete
- Clicking “next” automatically saves information from step to step
- Clicking “back” returns you to the previous step
- You can only move forward once the previous step is complete. However, once you’ve completed a step, you can go back and make changes without losing any other data.

Tips for Uploading Files



- Files must be in the specific format for that particular question, such as .doc, .xls or .pdf
- Once you upload a document, there is no delete feature. To replace a document, simply upload a new document for the same question and the newer document will overwrite the former.
- Once you have uploaded a document and click "Save," you will be able to view and download the document to ensure it is correct.

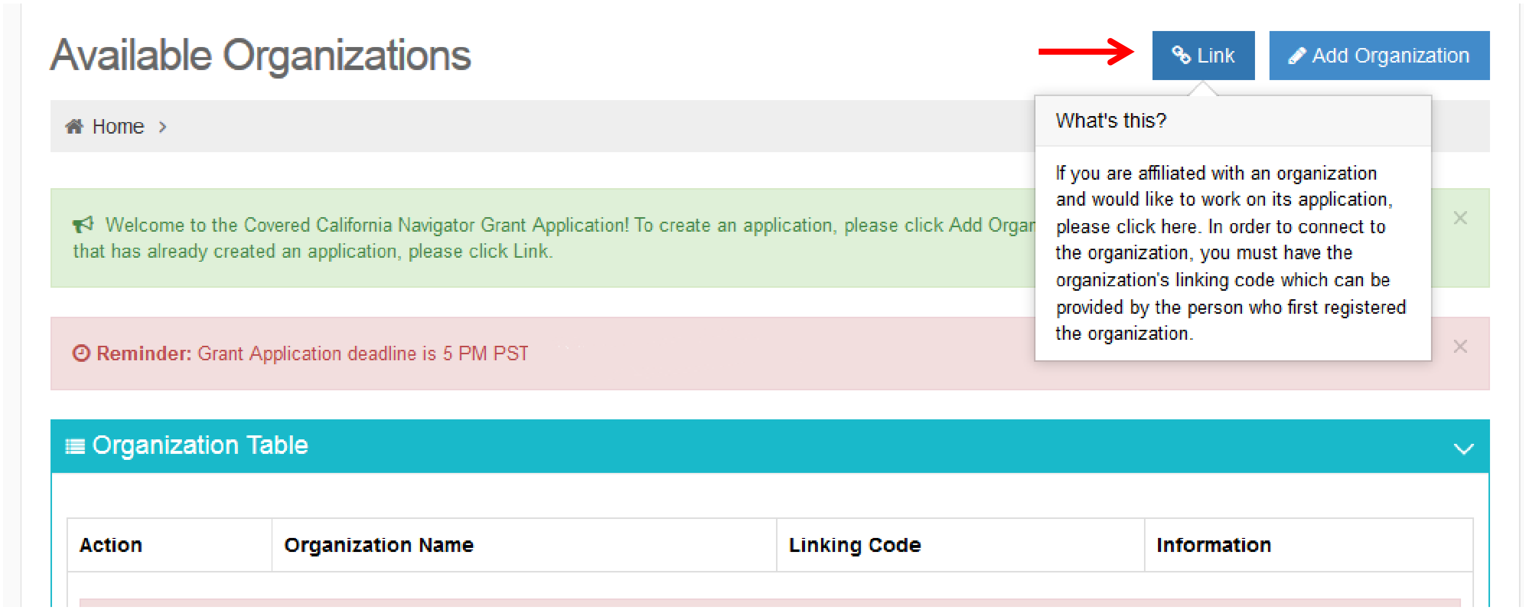
Additional Users

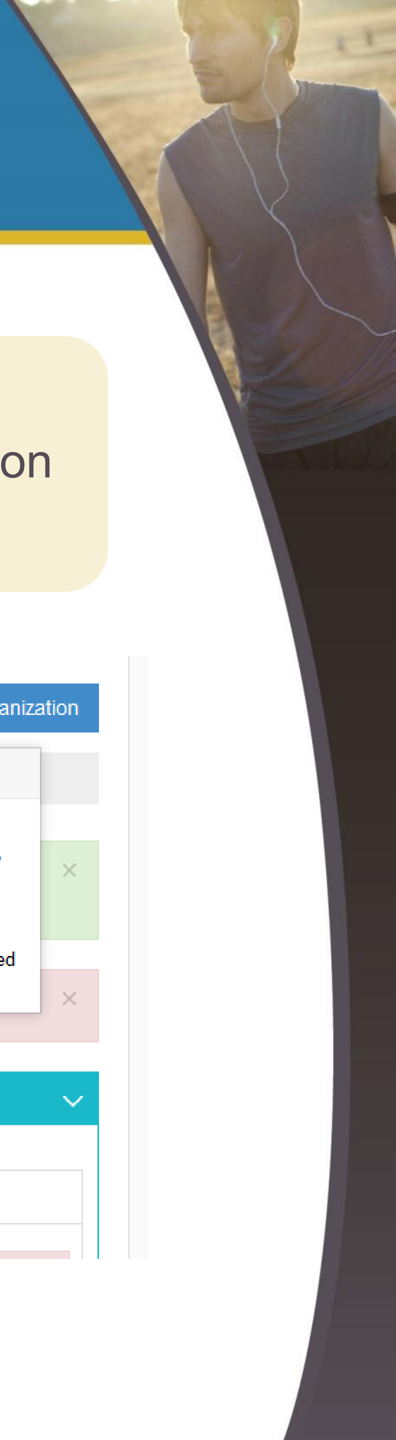
Organizations can designate more than one user to work on Navigator Grant Applications. However, multiple users should not login with the same user account. In order to link multiple users to the same organization, follow these steps:

- When the organization is registered it will be assigned a linking code. The linking code is listed next to the organization name on the home page.
- Any additional users will need to request to be linked to the organization's applications by clicking on the blue "Link" button in the upper right corner of the screen.
- Enter the linking code in the dialog box and click "Request Link."
- To accept the link request, the initial user – administrator – will need to approve the request and will receive an email that the request has been made.
- To review the request, click "Manage Staff" icon to the left of the organization name.
- Choose the additional user's role and click "Update."

Additional Users

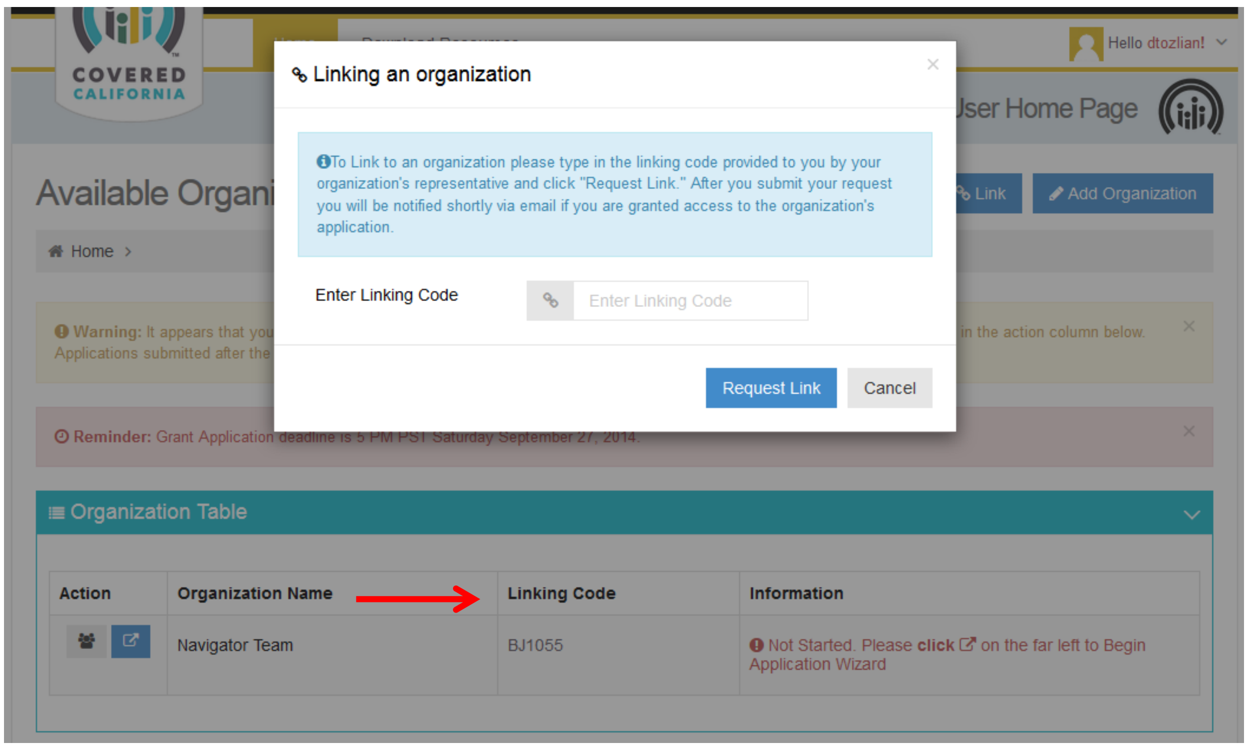
Any additional users will need to request to be linked to the organization's applications by clicking on the blue "Link" button in the upper right corner of the screen.



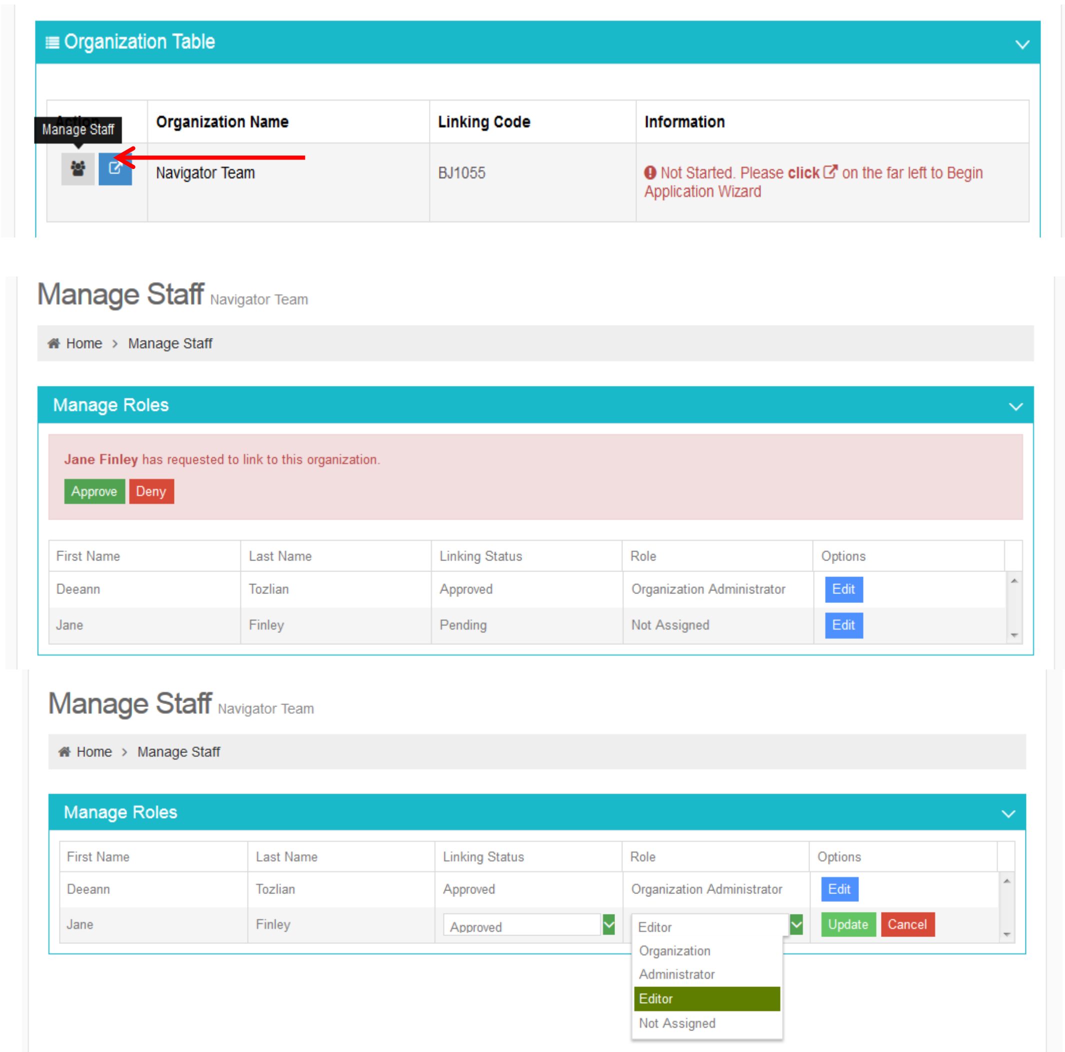


Additional Users

Enter the linking code in the dialog box and click “Request Link.”
(The linking code is listed next to the organization name on the home page.)



Additional User Requests



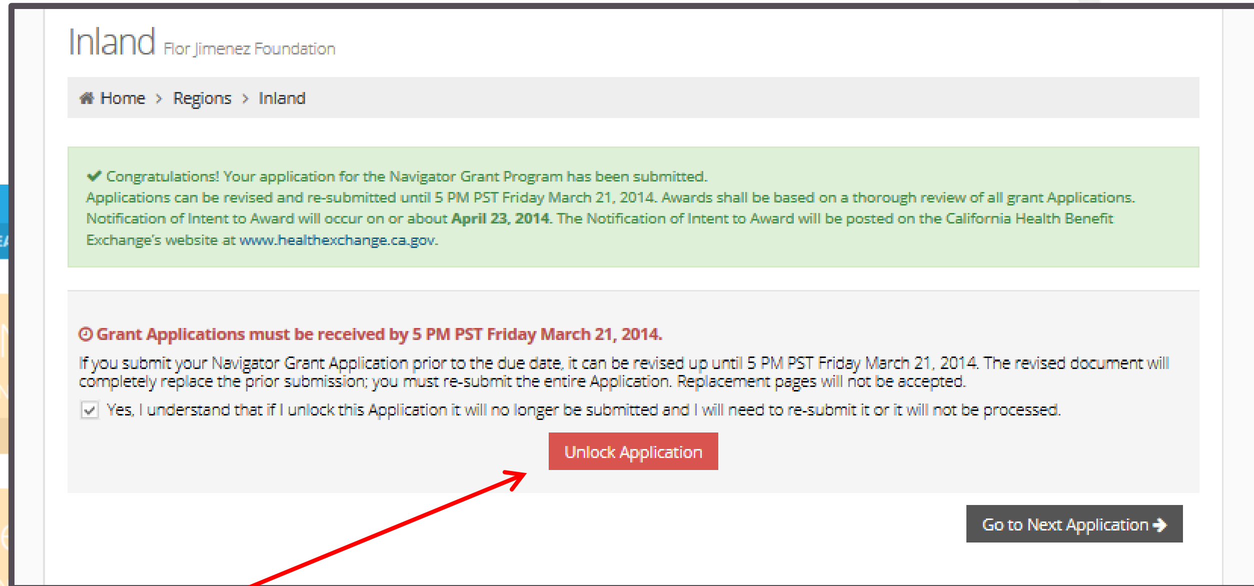
To accept the link request, the administrator user will need to approve the request and will receive an email that the request has been made.

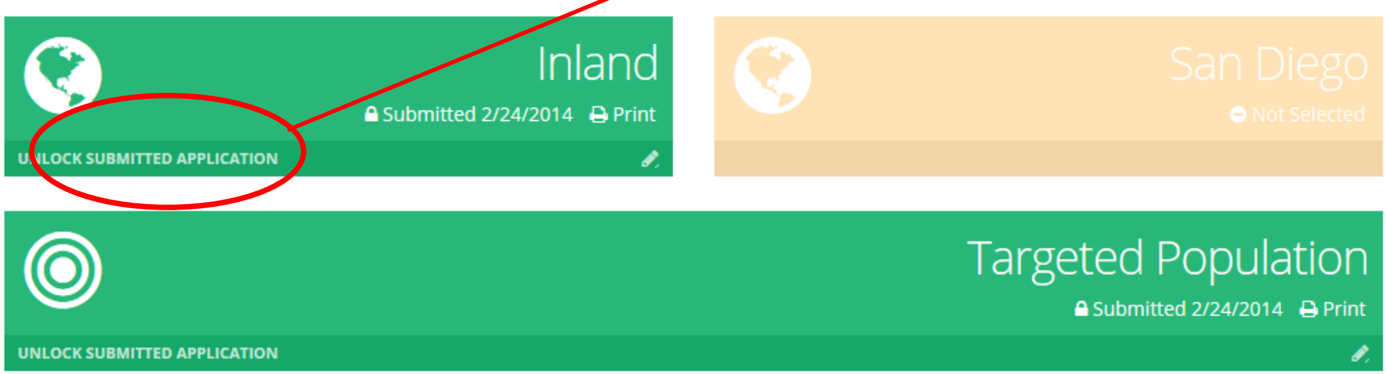
- To review the request, click "Manage Staff" icon to the left of the organization name.
- Approve the additional user and select the additional user's role and click "Update."

Additional User Requests

To Unlock a submitted application, click “UNLOCK SUBMITTED APPLICATION” in the green box of the region or funding pool application you’d like to revise and resubmit.

- Click “Unlock Application” and navigate to the application sections that require changes.

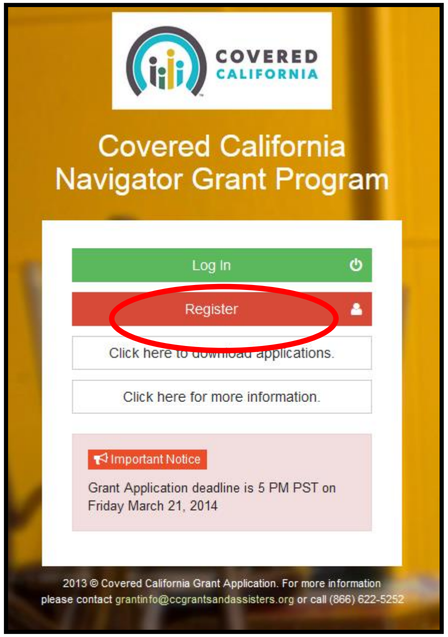


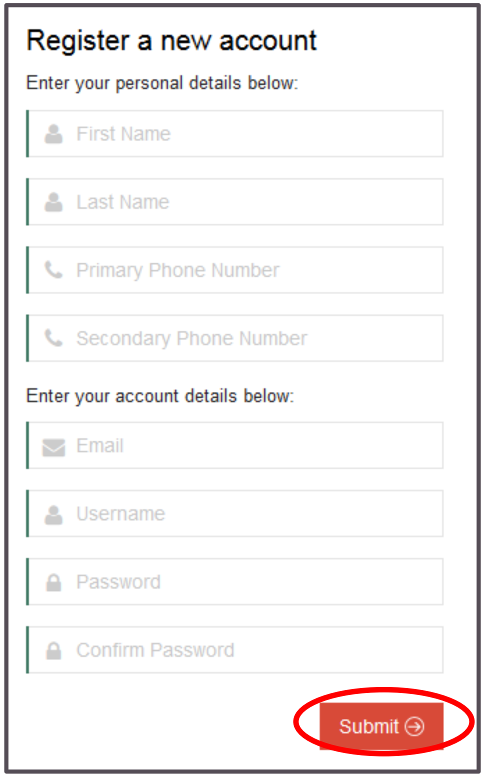


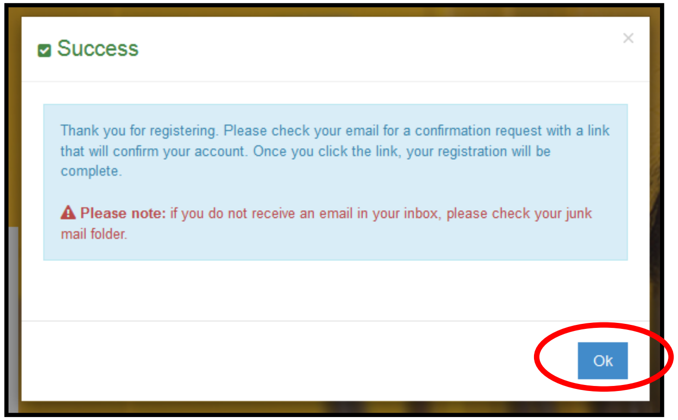
Getting Started

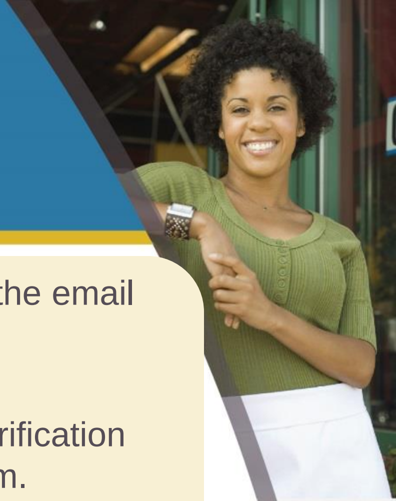
Register a New User

- Click “Register” and enter the new user’s information. The email address given will be the email used to communicate about the status of the application.
- Click “Submit”
- Click “Ok” in the “Success” dialog box and check the email account provided for the verification step. Be sure to check your junk box as the message comes from an automated system.
- Within the verification email, click the link “Please verify your email by clicking here” to confirm the email address and return to the application site.



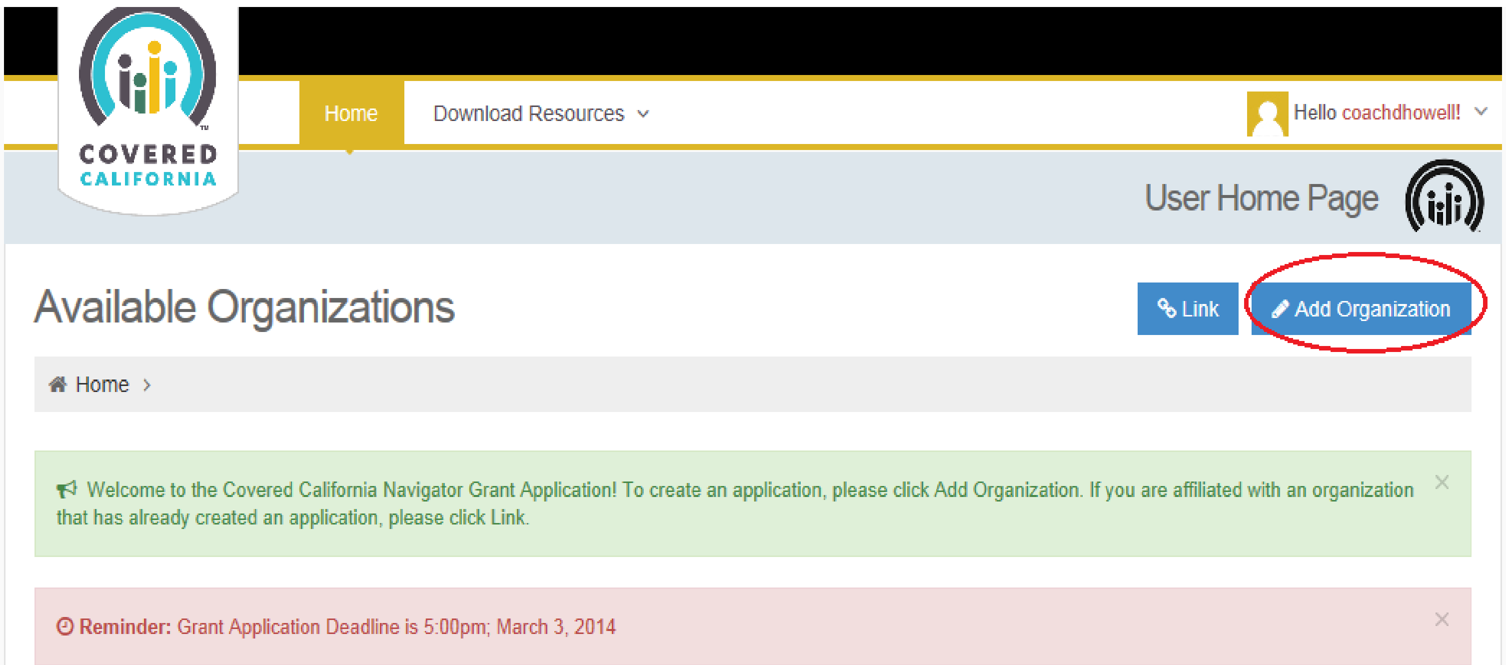






Register an Organization

1. Once logged into the system, click “Add Organization” in the top right corner.
2. Enter organization name and Tax ID number and click “Save.”



Two-Step Application Process

Section A - Applicant Information

This section will be completed by the Applicant once for all funding pools/regions.

A.1 General Applicant Information

A.1.1 Organization Information

A.1.2 Primary Contact

A.1.3 Organization Entity Type

A.1.4 Previous Applicant Experience

A.1.5 Additional Funding

A.2 Subcontractor Information

Two-Step Application Process

Section B – Funding Pool Specific Application Information

This section will be completed for each individual funding pool/region selected.

B.1 Narrative Sections 1 - 5

B.2 Funding Information

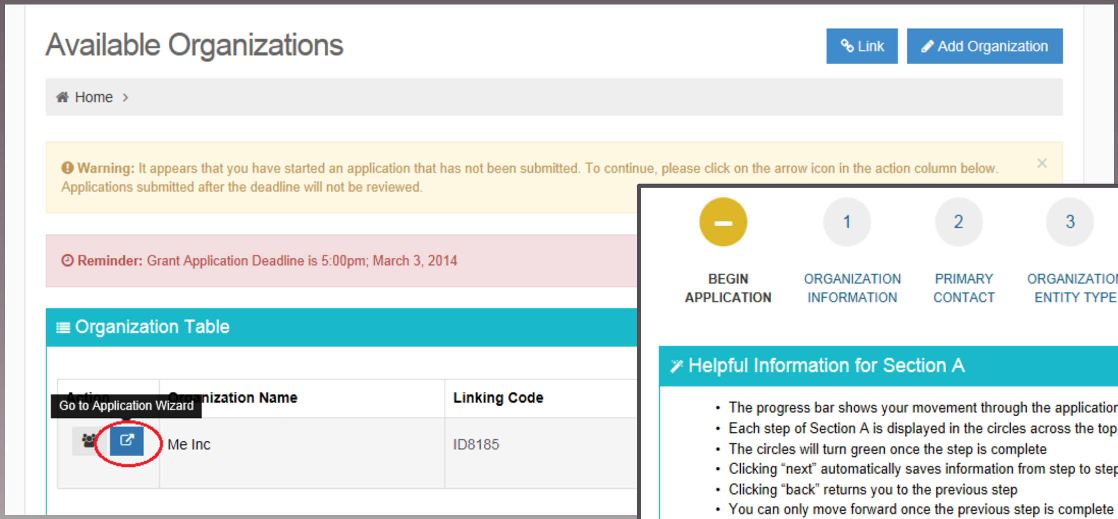
B.3 Experience with Target Population

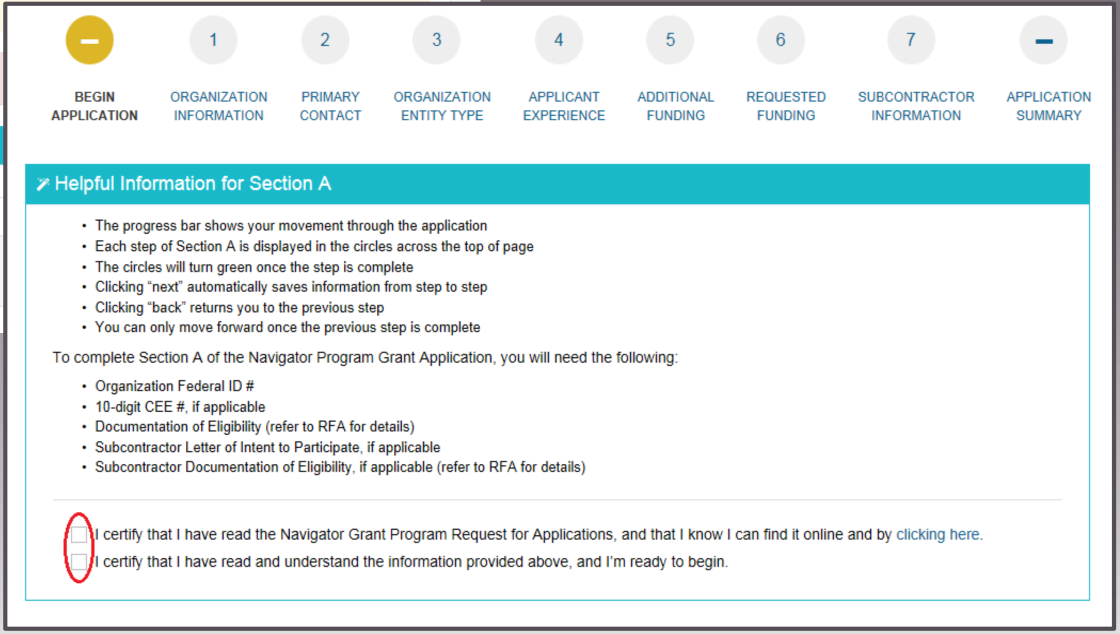
B.4 Subcontractor Assignment

B.5 Application Worksheets Uploads

Begin Application – Section A

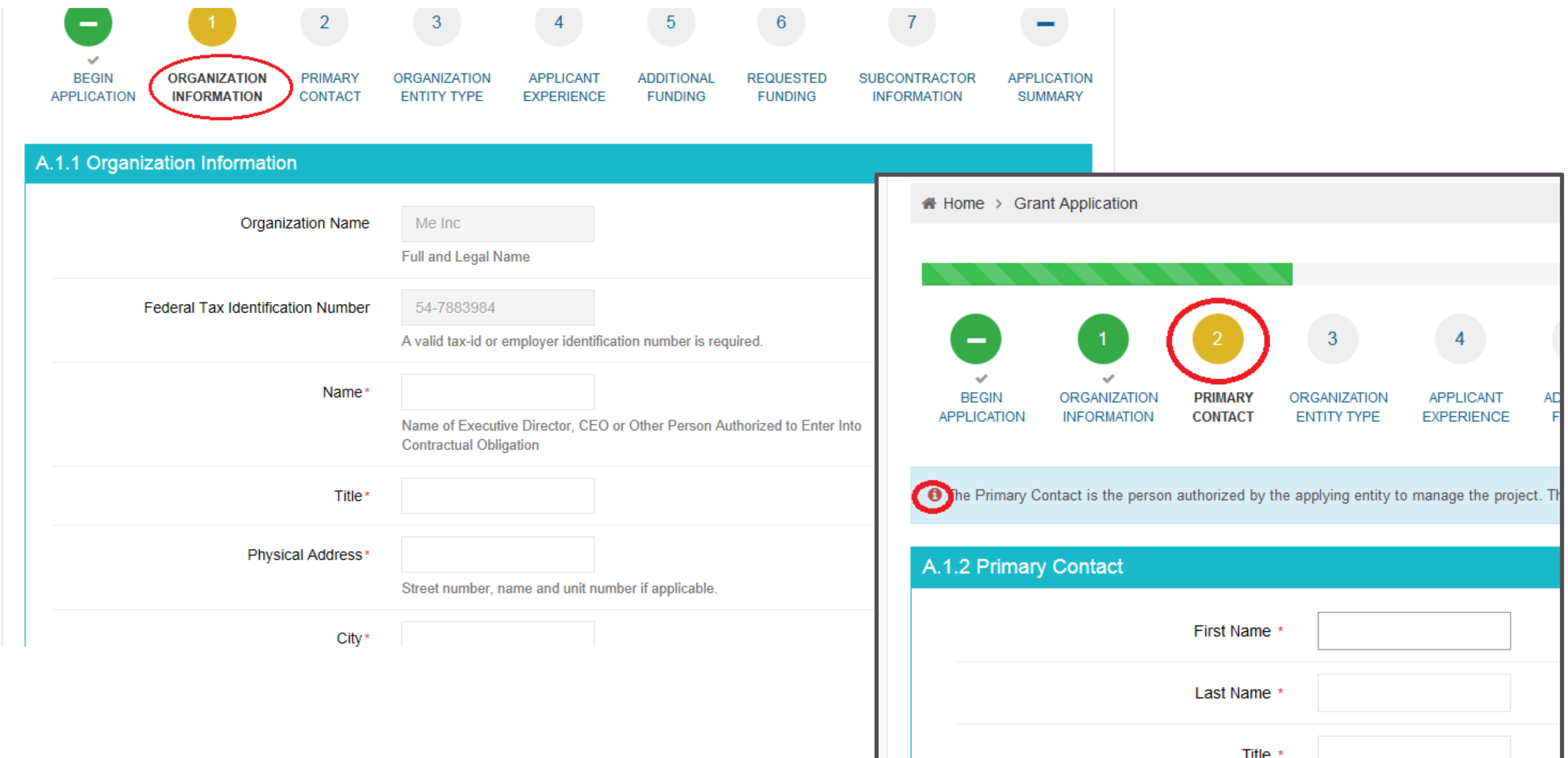
- To begin the application, open the application wizard by clicking on the blue icon next to the organization name.
- Review the "Helpful Information for Section A" and check the "I certify" boxes and click "next."





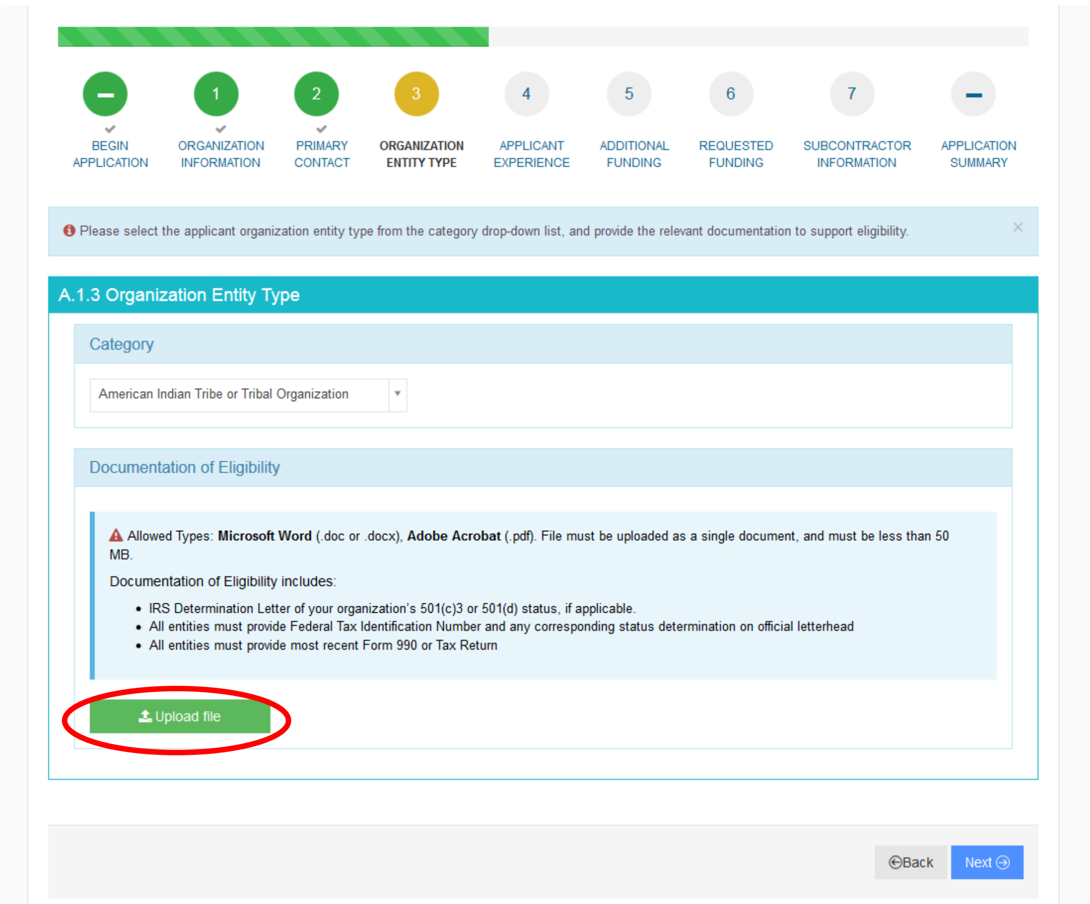
Organization Information and Primary Contact

- Complete the Organization Information section, noting all required fields, and click “next.”
- Complete the Primary Contact section. Note that the Primary Contact is not necessarily the grant writer, but rather is the person who will be managing the project for the applicant organization.
- Click “next” to select the Organization Entity Type.



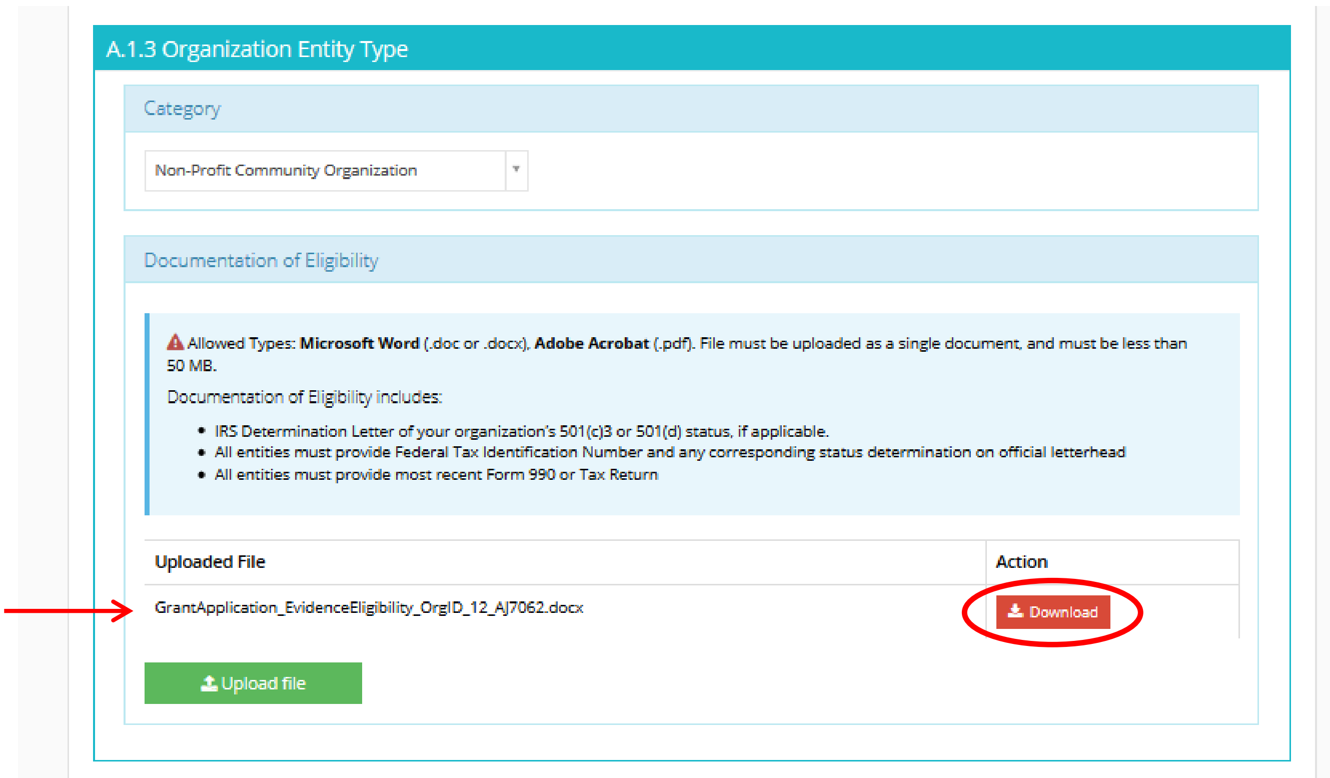
Organization Entity Type

- Select the entity type category from the drop-down menu.
- Upload documentation verifying entity type and click “next.”



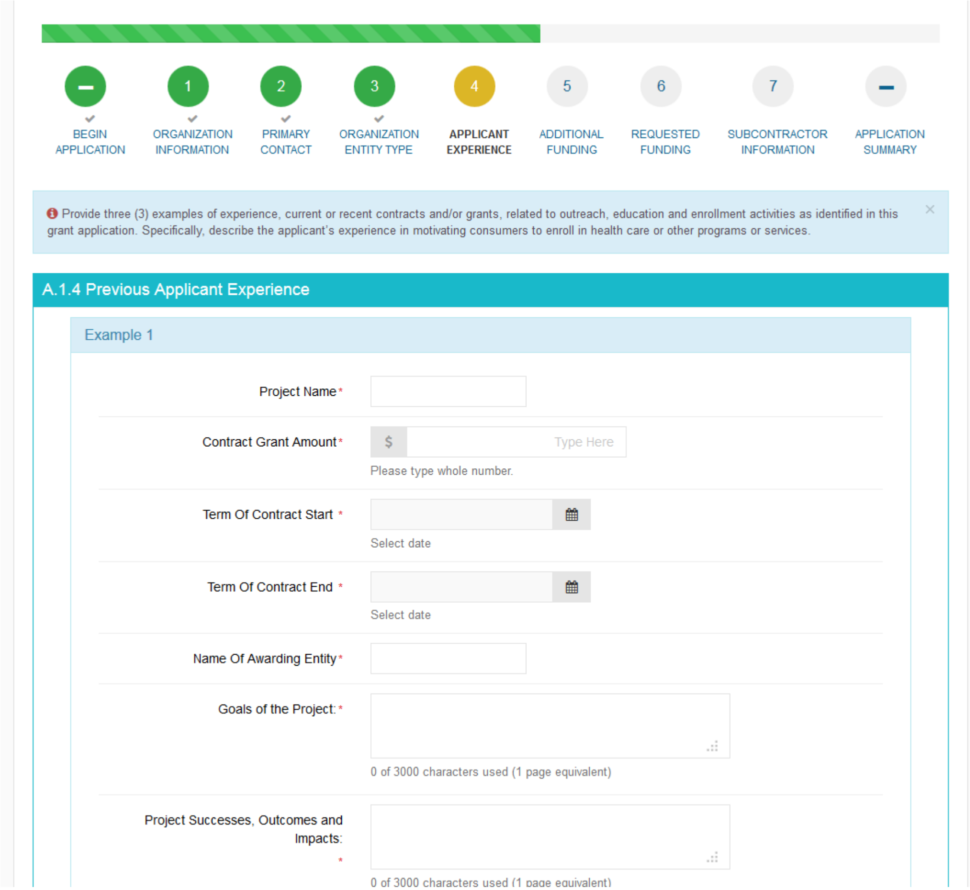
Organization Entity Type

- Once documentation has been uploaded, you will see a red "download" symbol in the action column and the name of the uploaded file will be listed.
- Click "next" to continue.

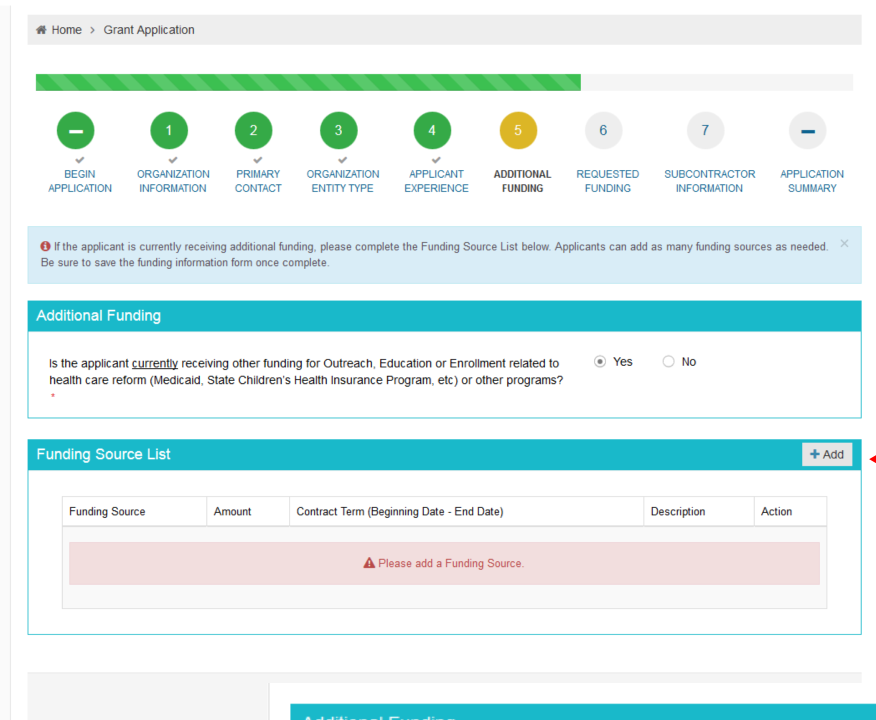


Applicant Experience

- Provide 3 examples of current or recent contracts and/or grants experience related to outreach, education, and enrollment activities.
- Click “next” to continue.
- Once the applicant enters all three examples, the applicant will be able to view all examples on this page.



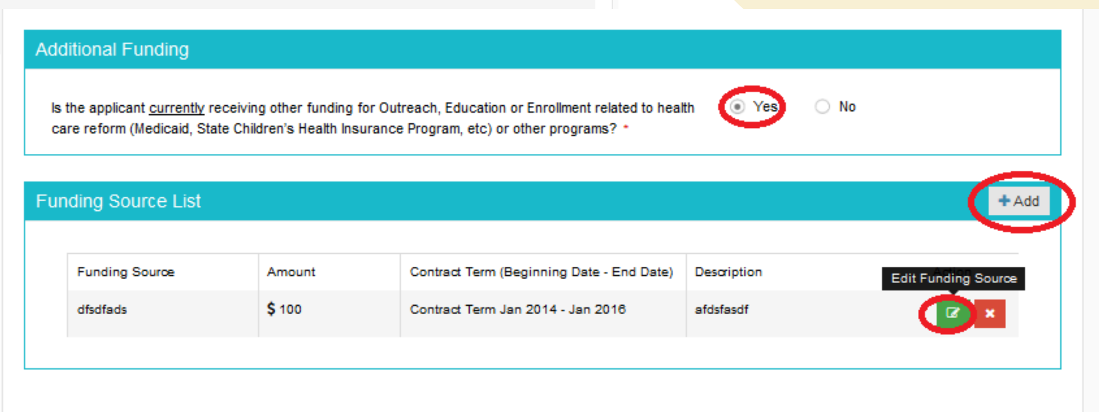
Additional Funding



If the applicant organization is receiving additional funding for similar work, select “Yes.”

- Click “Add,” located on the top right corner of the “Funding Source List” box. Applicants can add as many funding sources as needed.
- If Funding Source information needs to be revised, click “Edit” in the right column of the Funding Source List.
- Sources can also be deleted by clicking the red “X” in the right column.

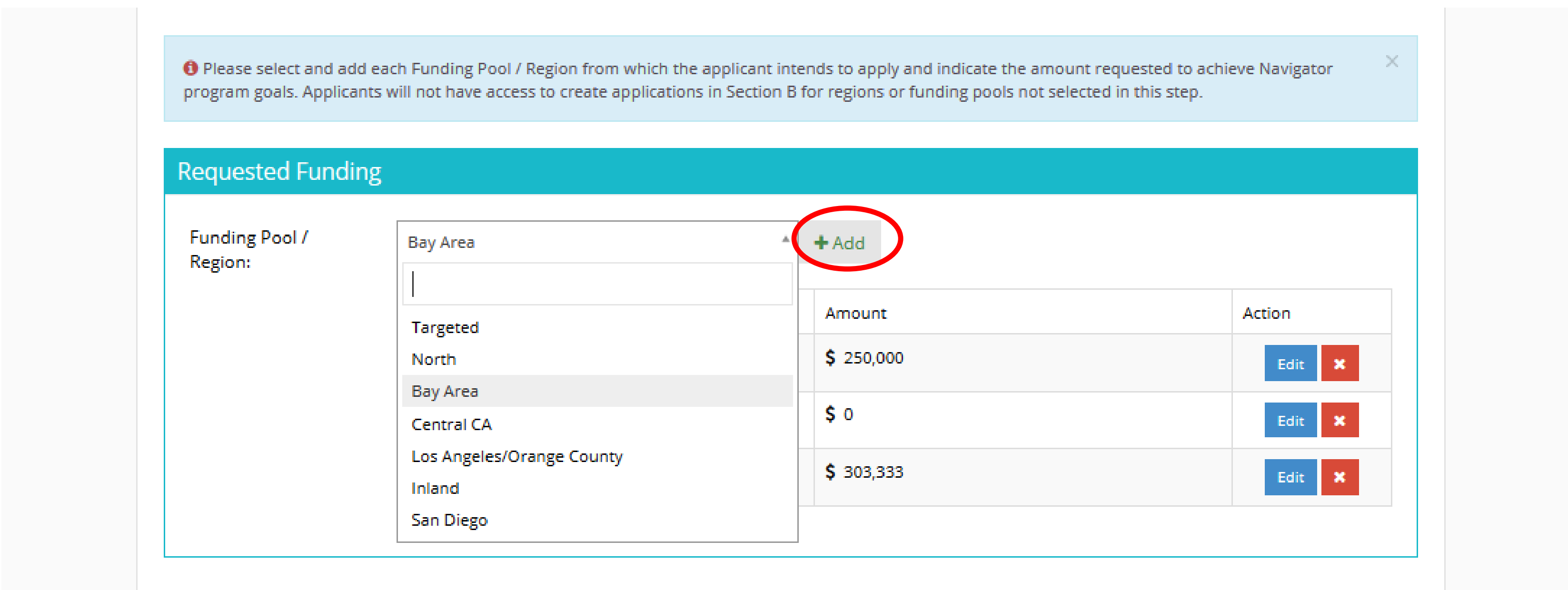
If the applicant is not receiving additional funding, select “No” and “Next” to continue.



Requested Funding

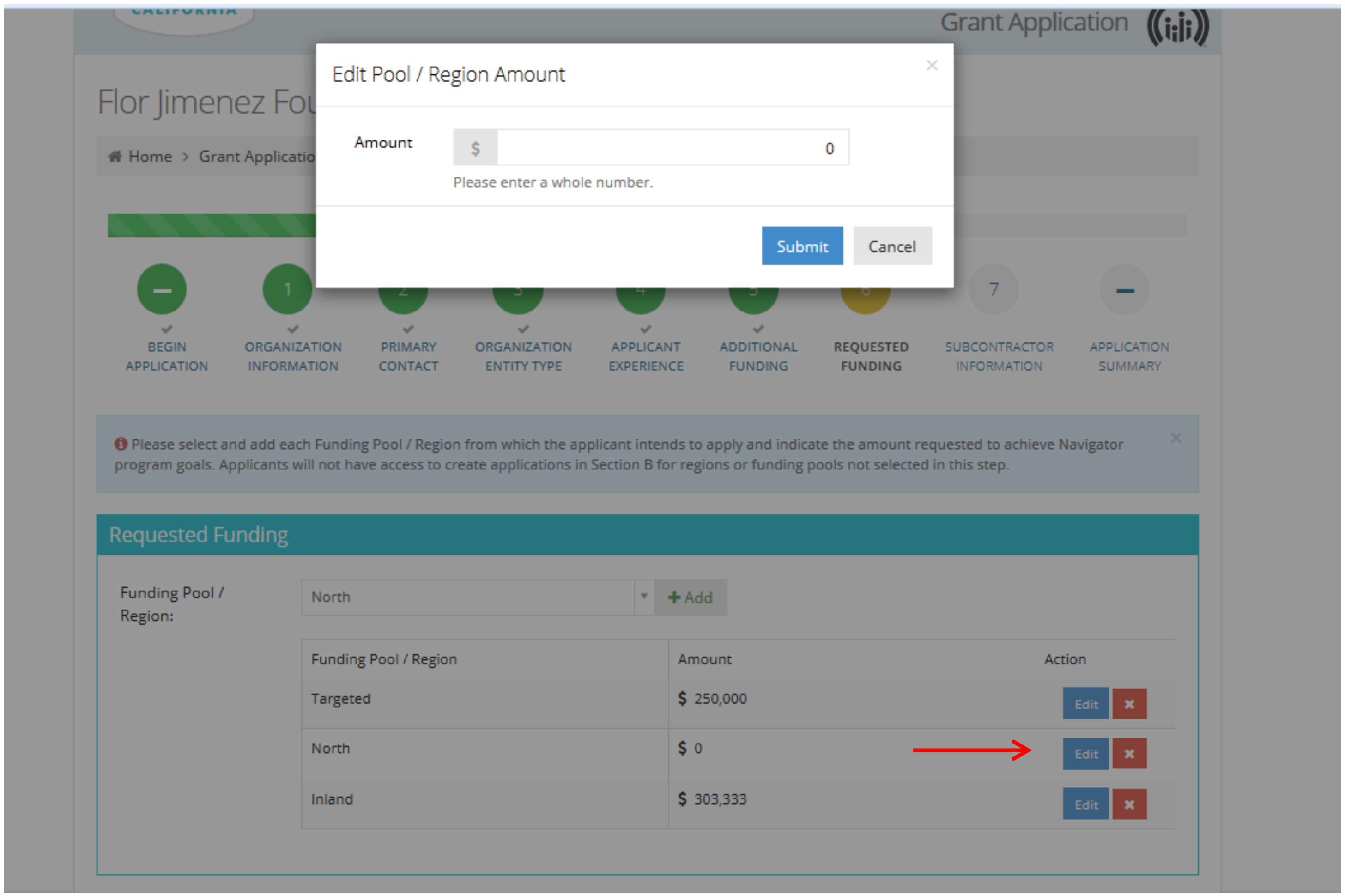
- From the drop-down menu select the intended Funding Pool or Region and click "Add."
- Click "Edit" to enter the amount of funding requested for each Funding Pool or Region.
- Applicants can submit up to 7 applications; one for each region and one for Targeted Funding Pool.

Important: You must select the regions and specify the funding amounts for each in this step in order to have access to the each region's section later in the application process.



Requested Funding

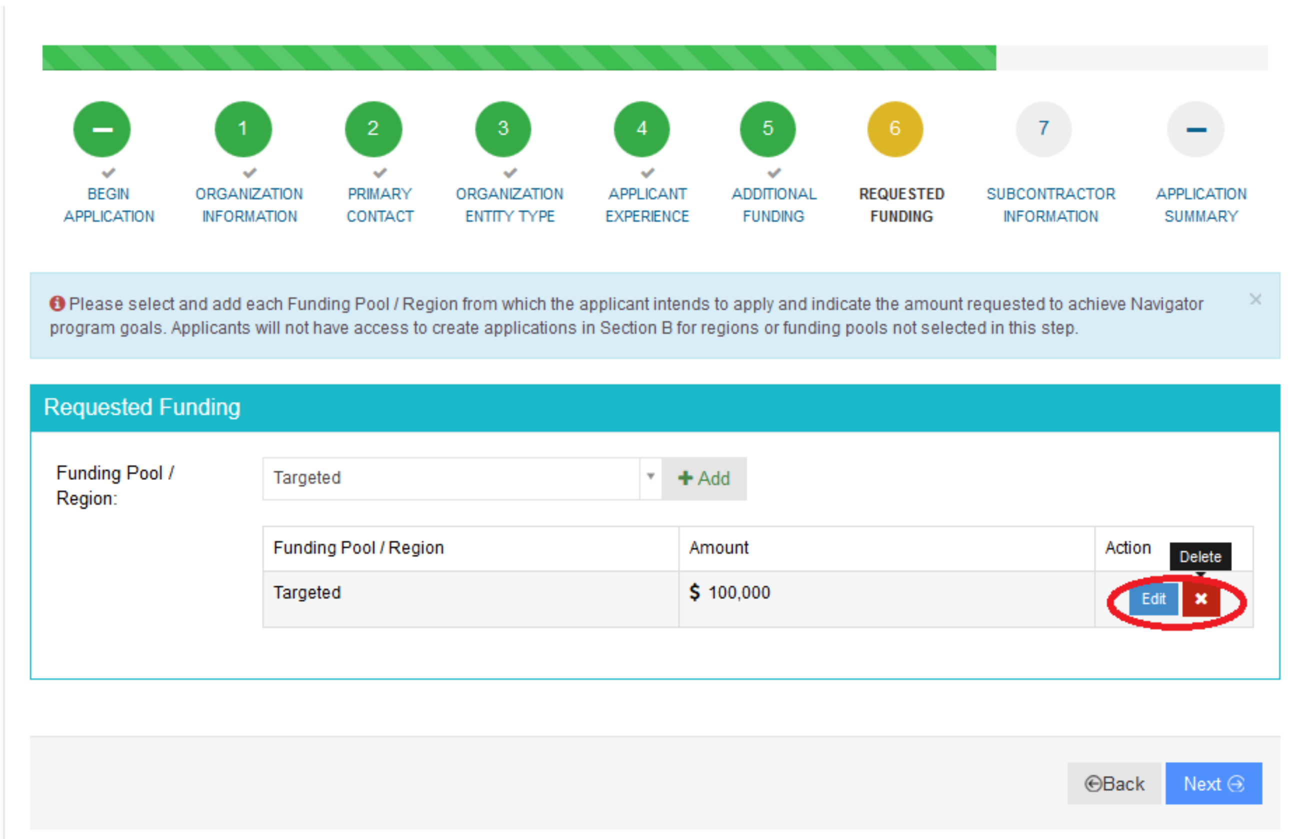
Click “Edit” to enter the amount of funding requested for each Funding Pool or Region.

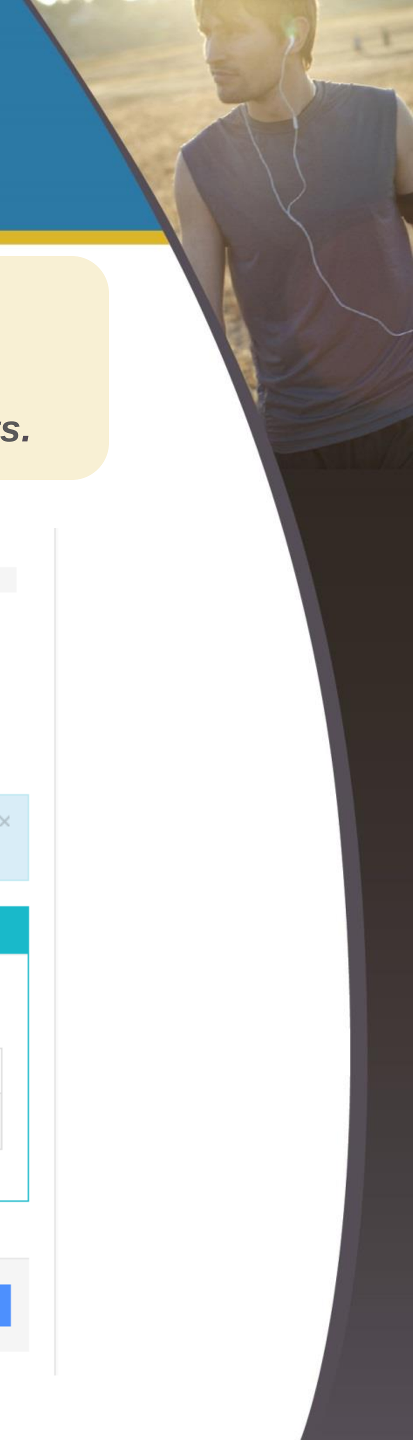


Requested Funding

- To make changes, select “Edit” in the Action column.
- To delete a Funding Pool or Region, click the red “X” in the Action column.

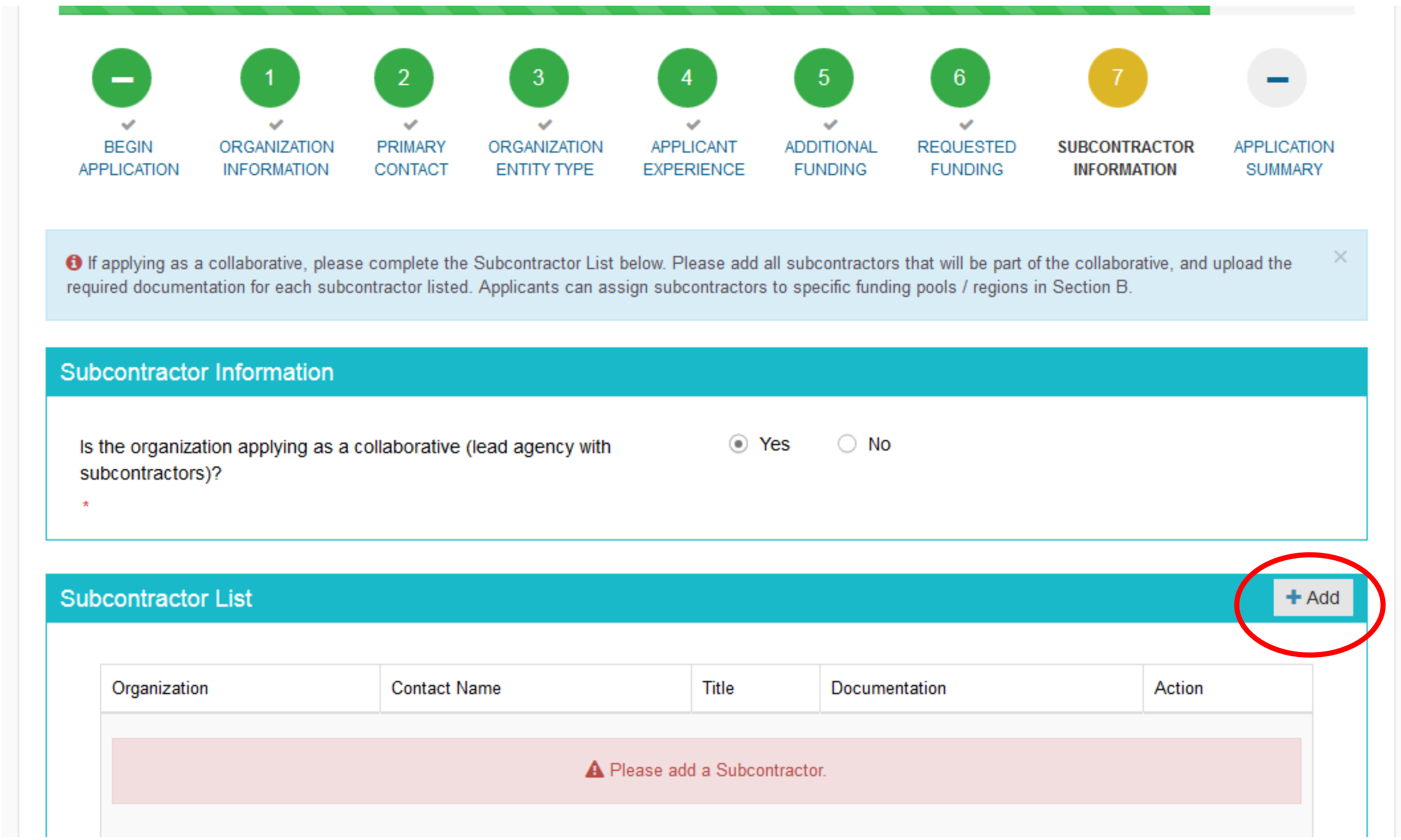
Note: Each region has specific minimum and maximum funding amounts.





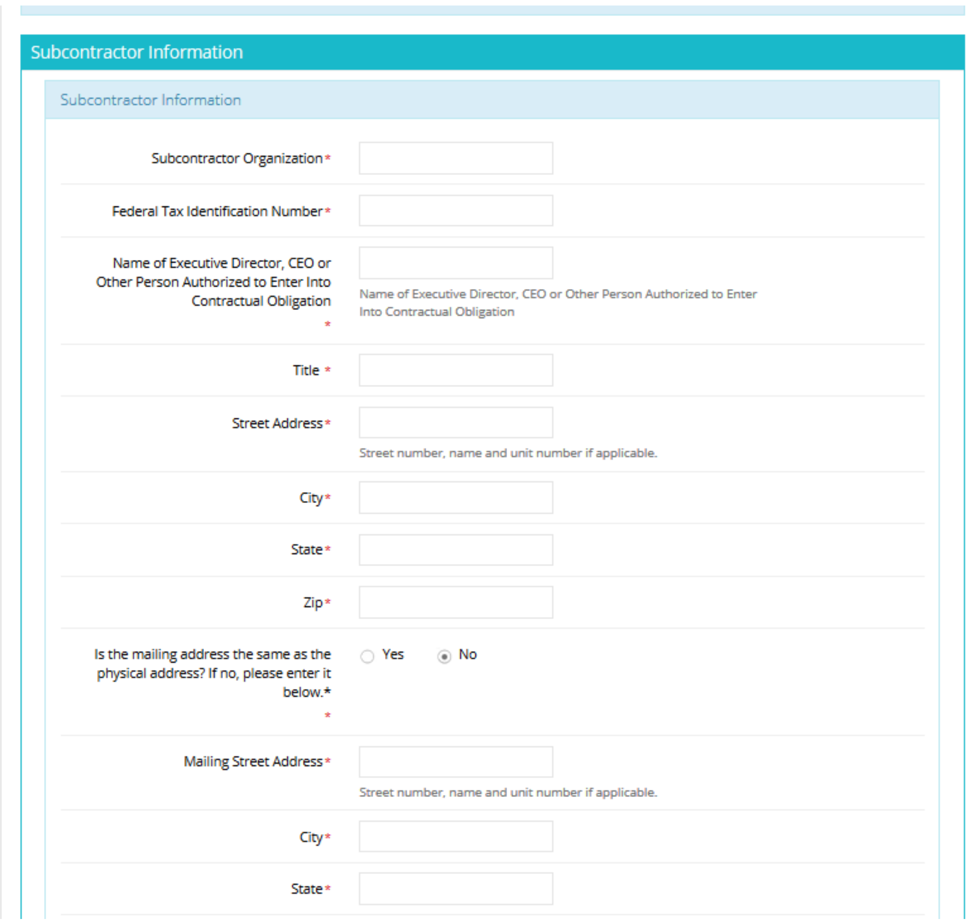
Subcontractor Information

- If applying as a collaborative, select “Yes” and complete the Subcontractor List.
- To add a subcontractor, click “Add” in the right corner of the “Subcontractor List” box.



Subcontractor Information

Applicants must specify all subcontractors in this step, regardless of region. You will be able to specify which subcontractors are assigned to each region or funding pool in section B.


Subcontractor Information

Subcontractor Information

Subcontractor Organization*

Federal Tax Identification Number*

Name of Executive Director, CEO or Other Person Authorized to Enter Into Contractual Obligation *

Name of Executive Director, CEO or Other Person Authorized to Enter Into Contractual Obligation

Title *

Street Address*

Street number, name and unit number if applicable.

City*

State*

Zip*

Is the mailing address the same as the physical address? If no, please enter it below.* *

Yes No

Mailing Street Address*

Street number, name and unit number if applicable.

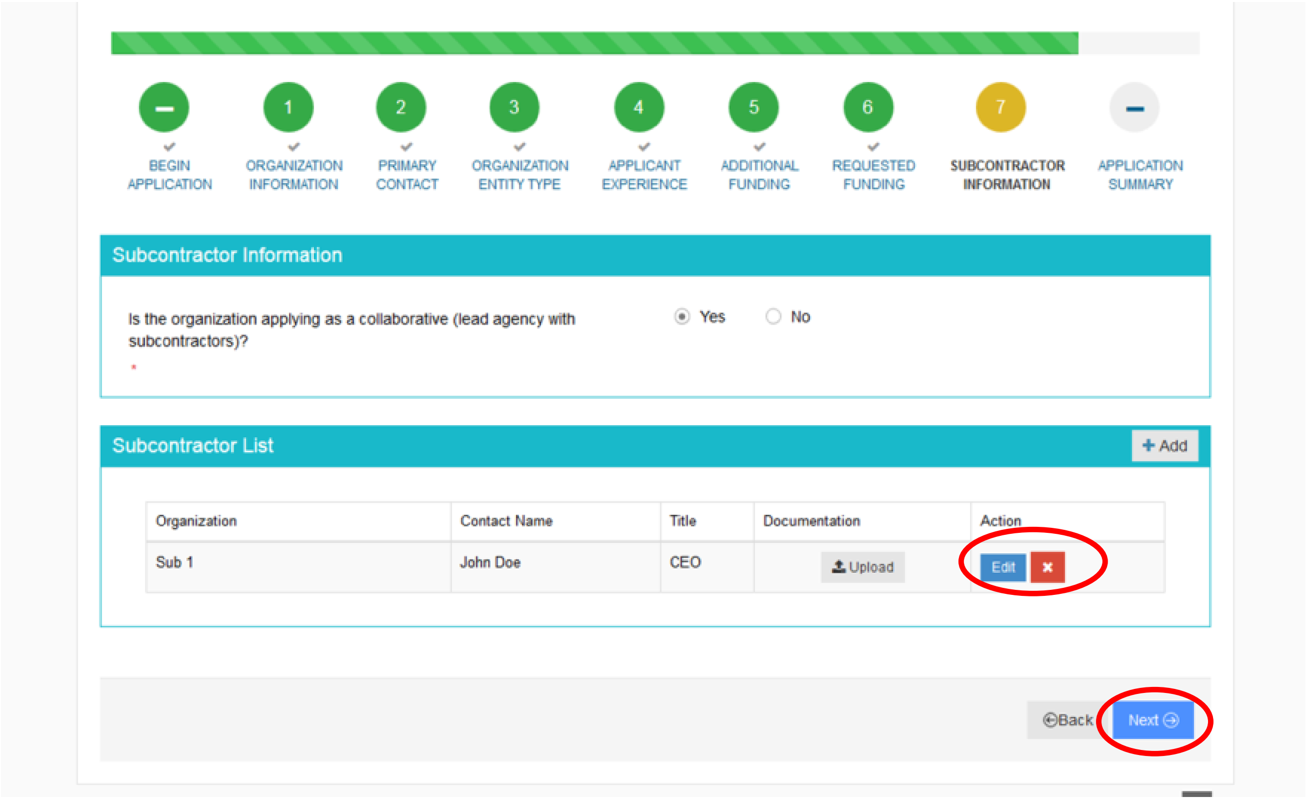
City*

State*

- Complete the Subcontractor Information form for all subcontractors that will be part of the collaborative, and upload the required documentation for each.
- Applicants will assign subcontractors to specific funding pools/regions in Section B.
- Click “Next” to continue.

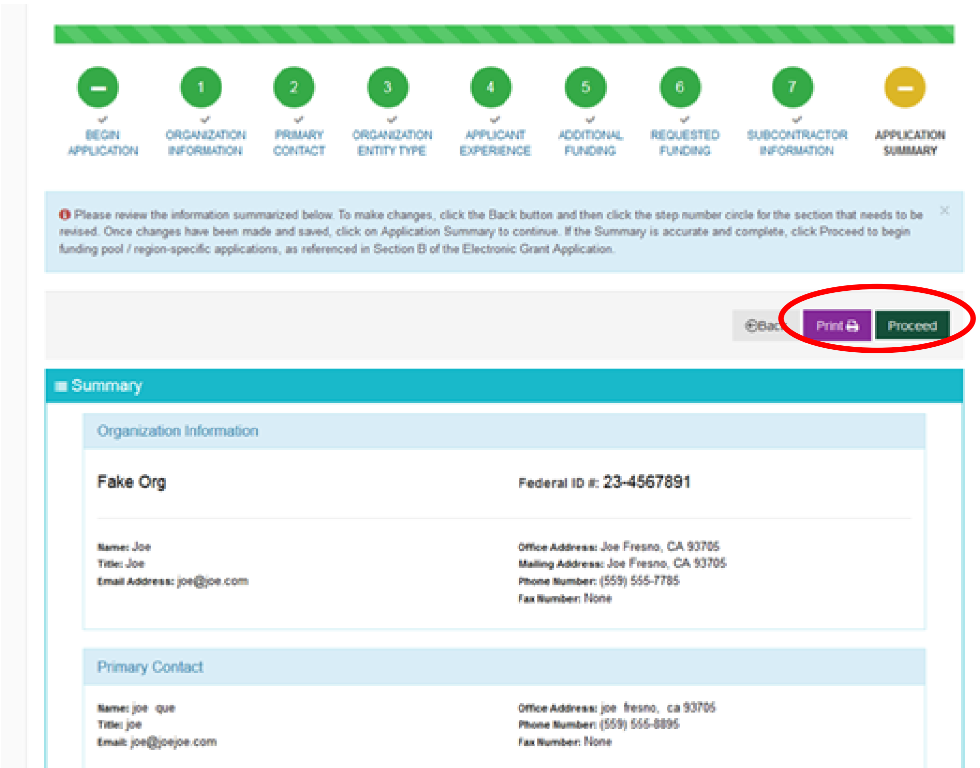
Subcontractor Information

- To make changes to subcontractor information added, click “Edit.”
- To delete a subcontractor and the information provided, click the red “X.”
- Click “Next” to continue.



Review Section A

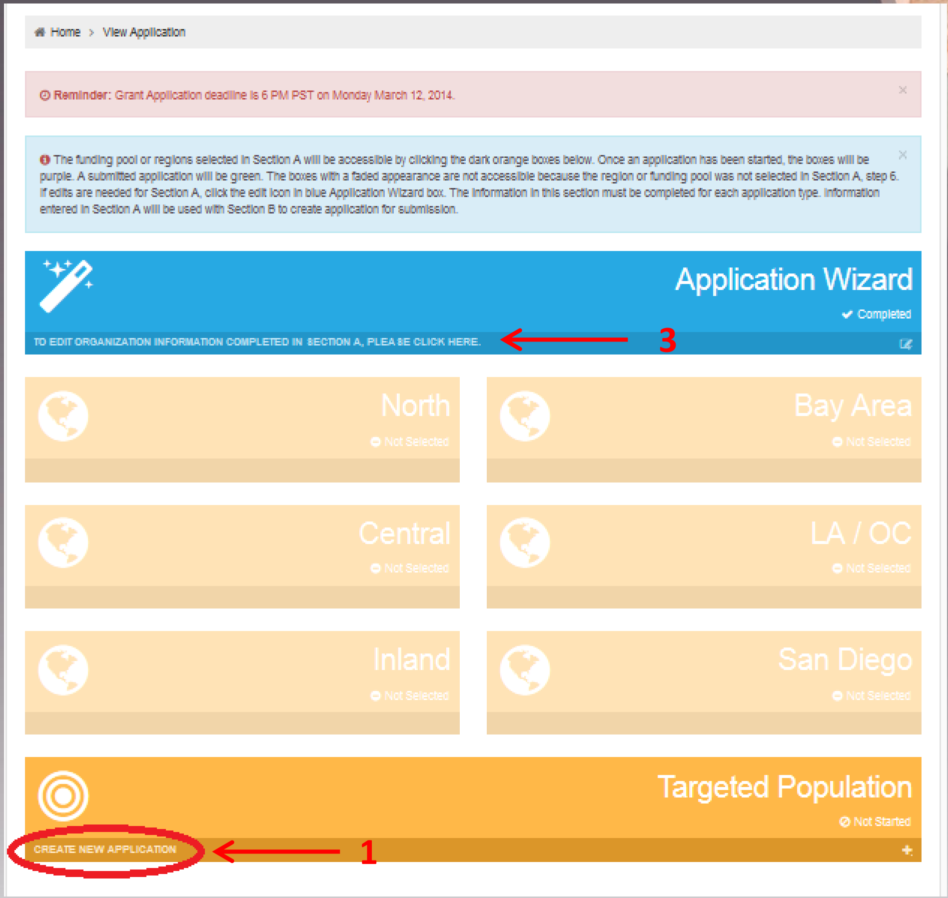
- After each step in Section A has been completed, applicants can review the Application Summary. The Summary can also be printed.
- To make revisions to information entered in Section A, click the back button and then click the step number circle for the section that needs to be revised.
- Save changes and click “Application Summary” to review and proceed.
- When the summary is accurate and complete, click “Proceed” to begin funding pool/region-specific applications.



Section B - Funding Pool Applications

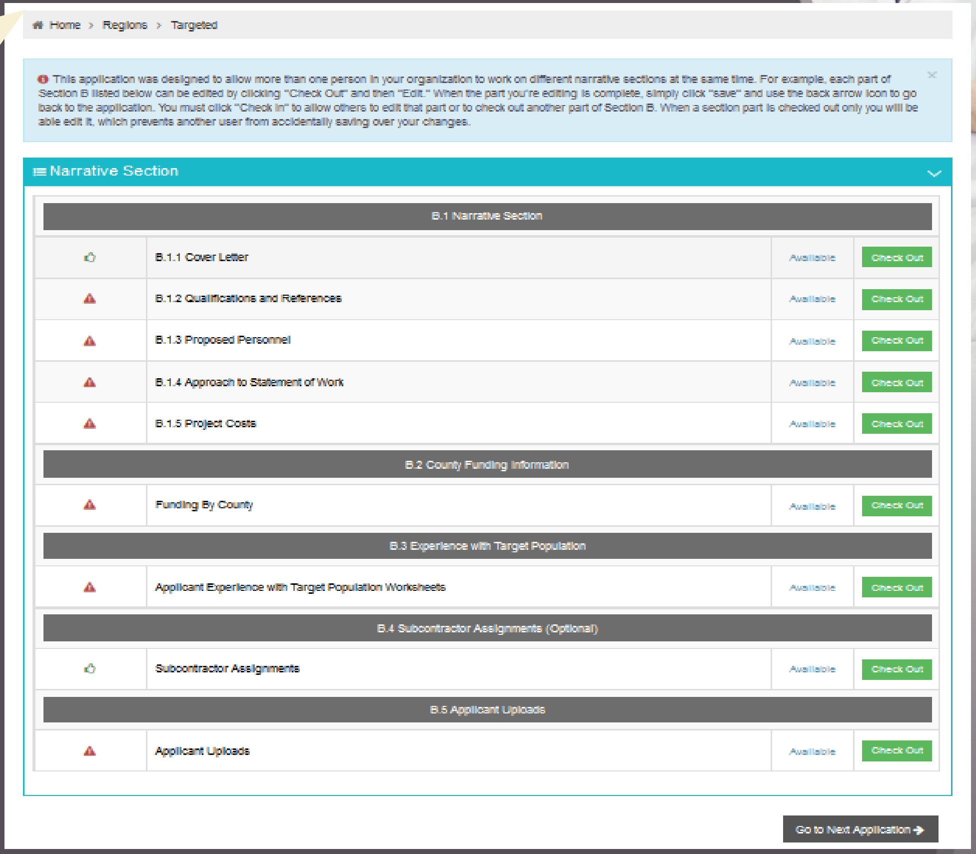
The information in this section must be completed for each funding pool or region for which the organization intends to apply. Information entered in Section A will be used with Section B to create an application for submission.

- To begin Section B, click “Create a New Application” in the yellow bar toward the bottom of the Targeted Population box (or the region box selected in Section A).
- The boxes with a faded appearance are not accessible because the region or funding pool was not selected in Section A, step 6.
- If edits are needed for Section A, click the edit icon in blue Application Wizard box.



Narrative Section Tips

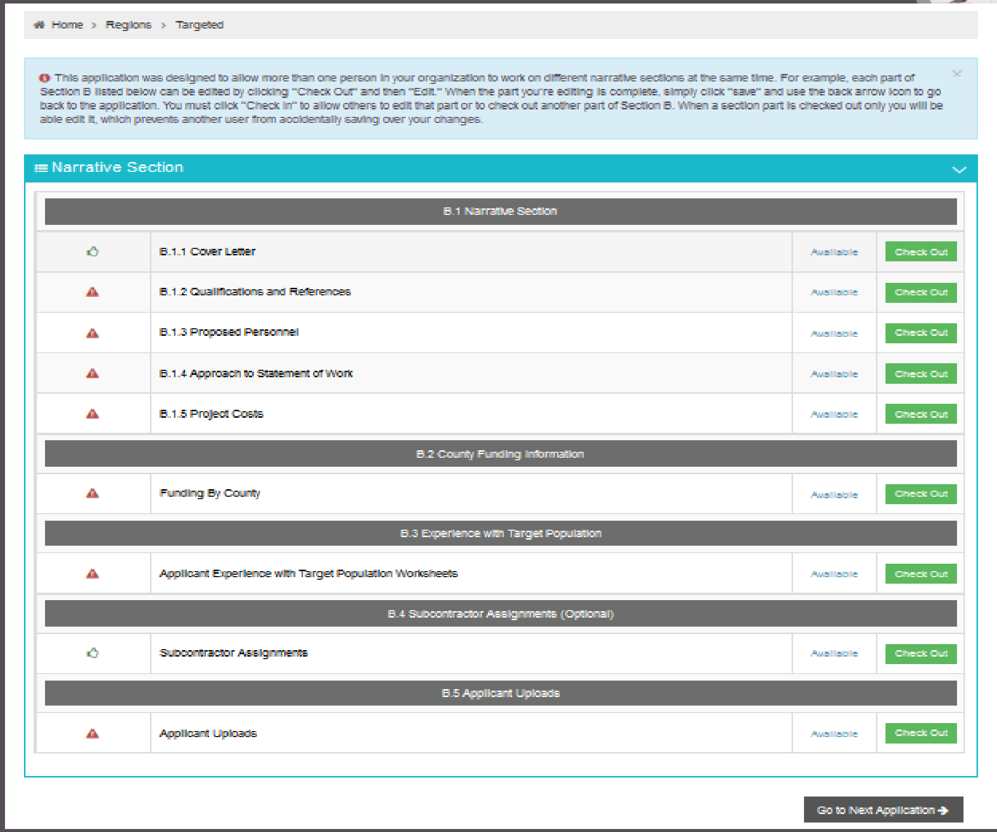
- Click the “Check Out” button in the row of the narrative section you want to work on. Click “Edit” to open the section.
- Click “Save” at any time to save your work.
- The narrative sections can be completed in any order. You’ll see a “thumbs up” in the left column when the item is complete. A “warning” symbol indicates that the section is not complete.
- Use Attachment I – Electronic Grant Application as a guide.
- Click “Check In” When you are finished with a section.



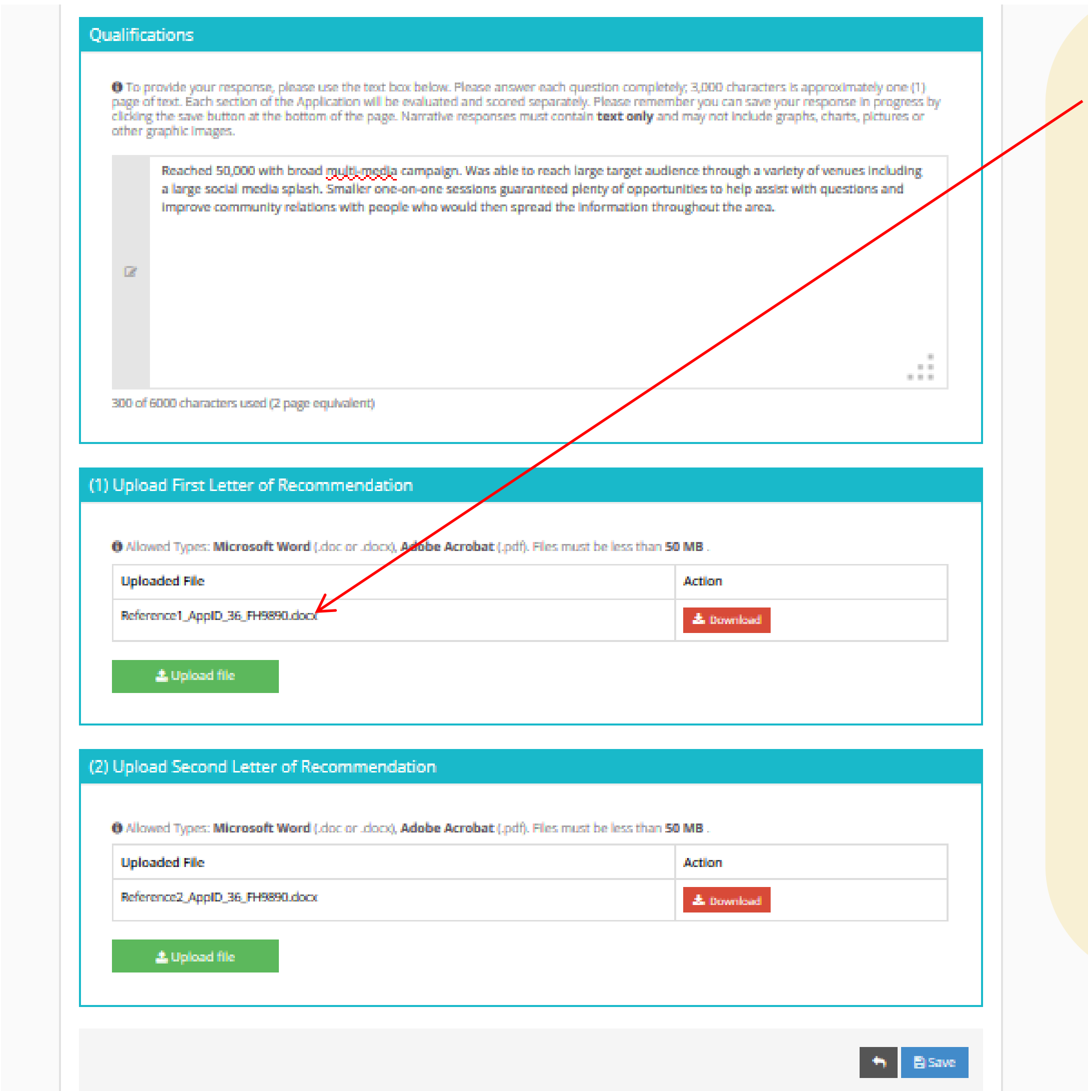
Applicants can check out and check in a narrative section as many times as necessary. A section does not have to be complete to check it back in.

Section B - Narrative Section

- The information in this section must be completed for each region. Information entered in Section A will be used with Section B to create an application for submission.
- To work on a specific section, click the green "Check Out" box and then click the blue "Edit."



Qualifications & References



- In addition to the narrative portion of Section B.1.2, two Letters of Recommendation are required. Each letter needs to be uploaded separately in the two upload fields provided.
- To upload each letter, click on “Upload file” and “browse” to the file’s location on your computer.
- Click “Open” in the “Choose File to be Uploaded” and the file will be listed under the “Upload File” symbol.
- Click the “Save” button

Proposed Personnel, Approach to Statement of Work and Project Costs

- Sections B.1.3, B.1.4 and B.1.5 require text-only responses.
- The text box field will display the number of characters used as you type.
- Be sure to number your responses as instructed in Attachment I.

Approach to Statement of Work Targeted

More Info

Home > Targeted > Narrative Section > Approach to Statement of Work

Click on 'More info' above for additional instructions for completing this section.

Approach to Statement of Work

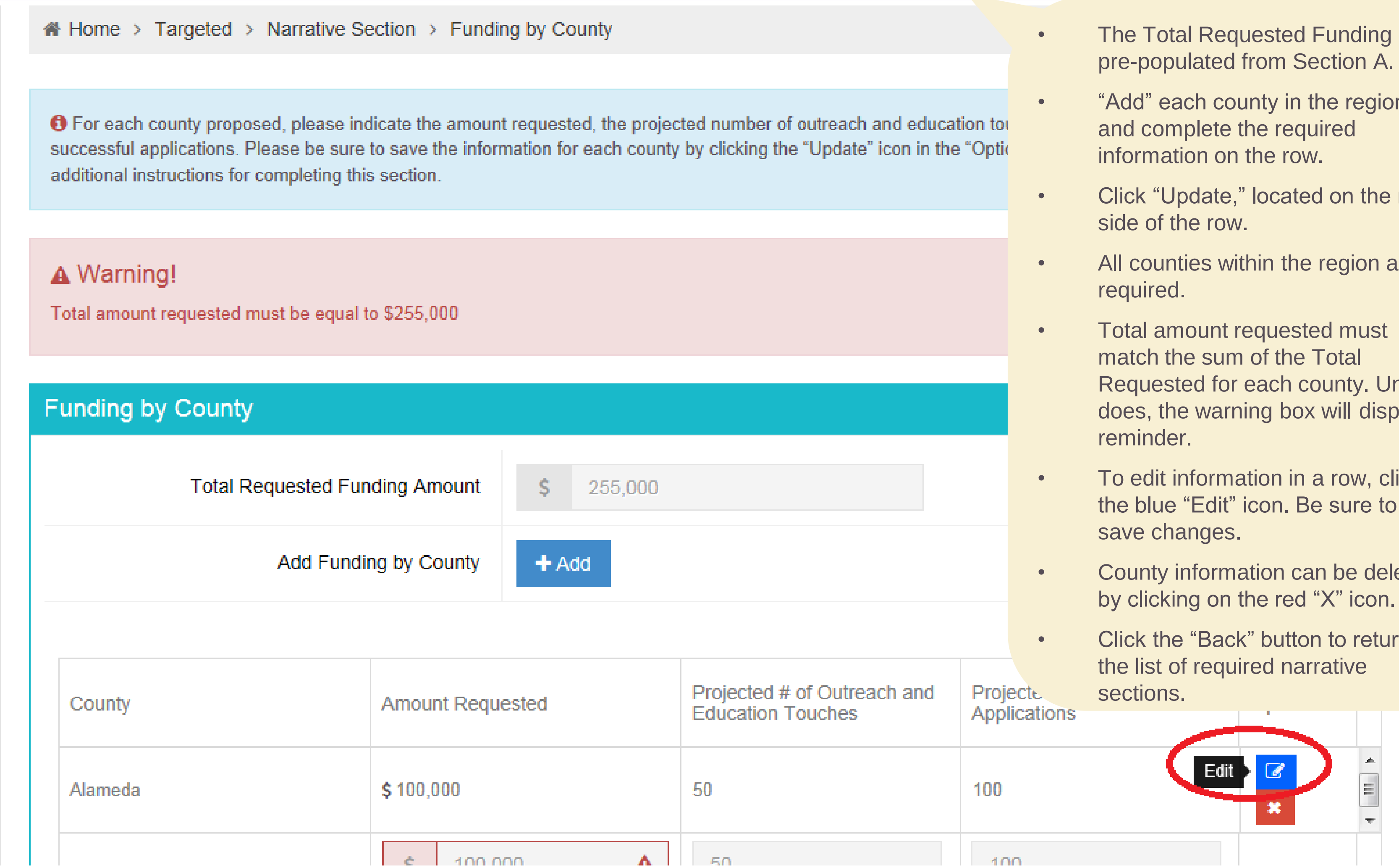
To provide your response, please use the text box below. Please answer each question completely; 3,000 characters is approximately one (1) page of text. Each section of the Application will be evaluated and scored separately. Please remember you can save your response in progress by clicking the save button at the bottom of the page. Narrative responses must contain **text only** and may not include graphs, charts, pictures or other graphic images.

Target Population

0 of 3000 characters used (1 page equivalent)

Funding by County

- The Total Requested Funding is pre-populated from Section A.
- “Add” each county in the region and complete the required information on the row.
- Click “Update,” located on the right side of the row.
- All counties within the region are required.
- Total amount requested must match the sum of the Total Requested for each county. Until it does, the warning box will display a reminder.
- To edit information in a row, click the blue “Edit” icon. Be sure to save changes.
- County information can be deleted by clicking on the red “X” icon.
- Click the “Back” button to return to the list of required narrative sections.



Experience with Target Population

- For each county in the region, provide ethnicity, language, income level and age group demographic information of individuals to be served.
- To make changes to any information entered, click “Edit” in the Actions column.
- In this section, the applicant should be as provide detailed information regarding: ethnicities, languages, age groups and income levels of the consumers they intend to reach. The applicant approach/strategies will be described in the workplan worksheet and narrative sections of this application.

Experience with Target Population Targeted

More Info

Home › Targeted › Narrative Section › Experience with Target Population › Alameda

Click on 'More info' above for additional instructions for completing this section.

Applicant Experience With Target Population

County	Funding Request	Projected Number of Outreach and Education Touches	Projected Successful Applications
Alameda	$100,000	50	100

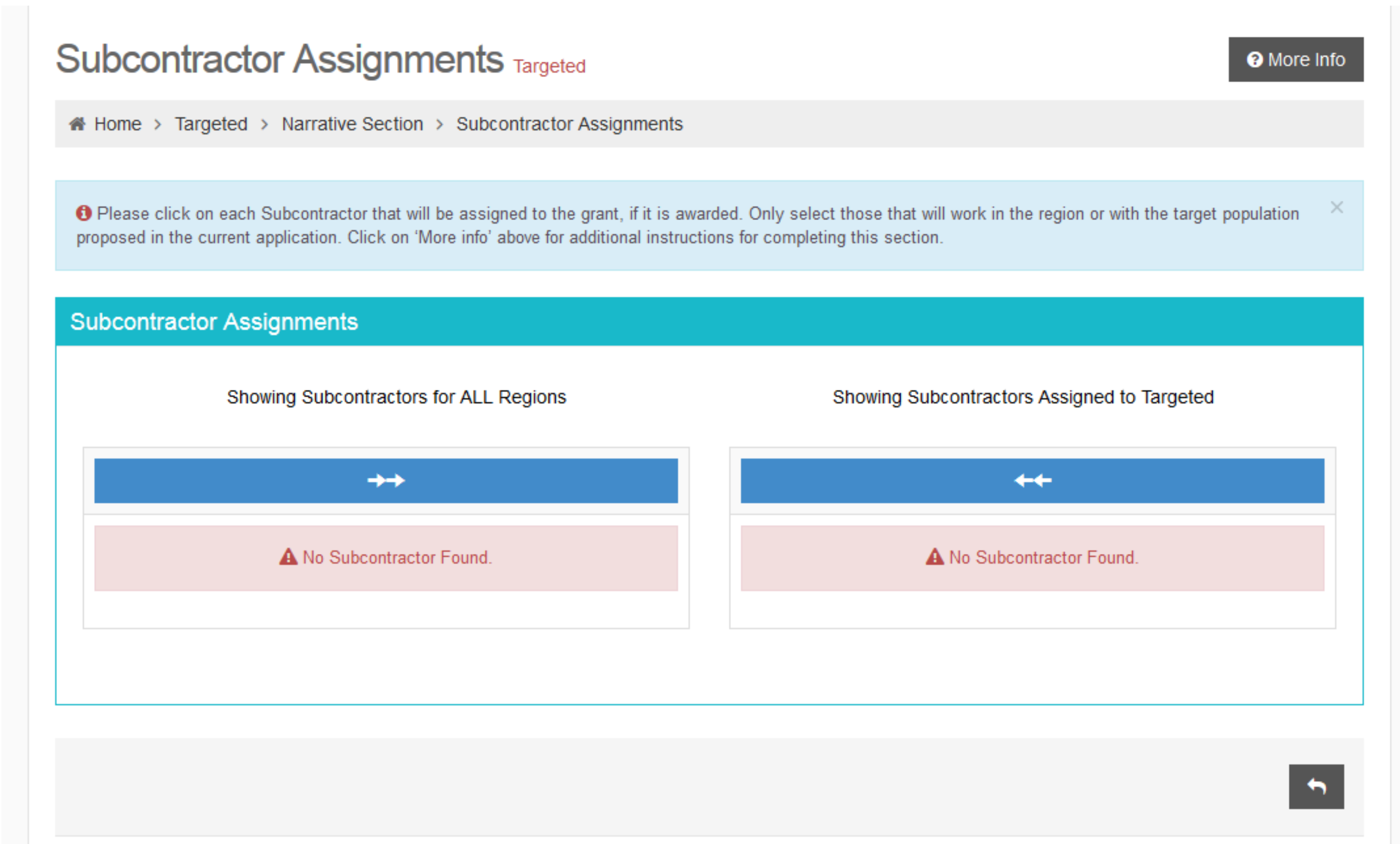
Describe the ethnicity of proposed target population(s):

+ Add

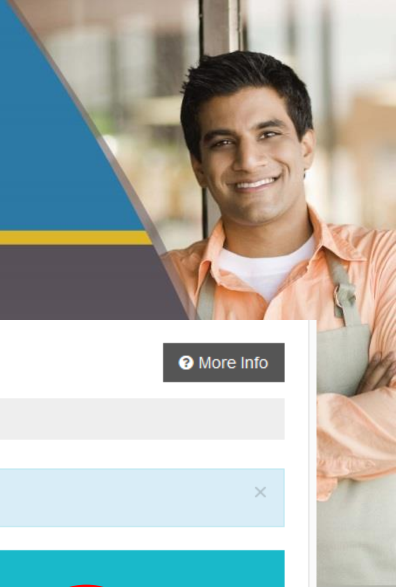
Ethnicity	Estimated Percentage Planned Reach	Projected Number of Outreach and Education Touches	Actions
African	% 1000	500	Edit ✖
Total	% 1000	500	

Subcontractor Assignments

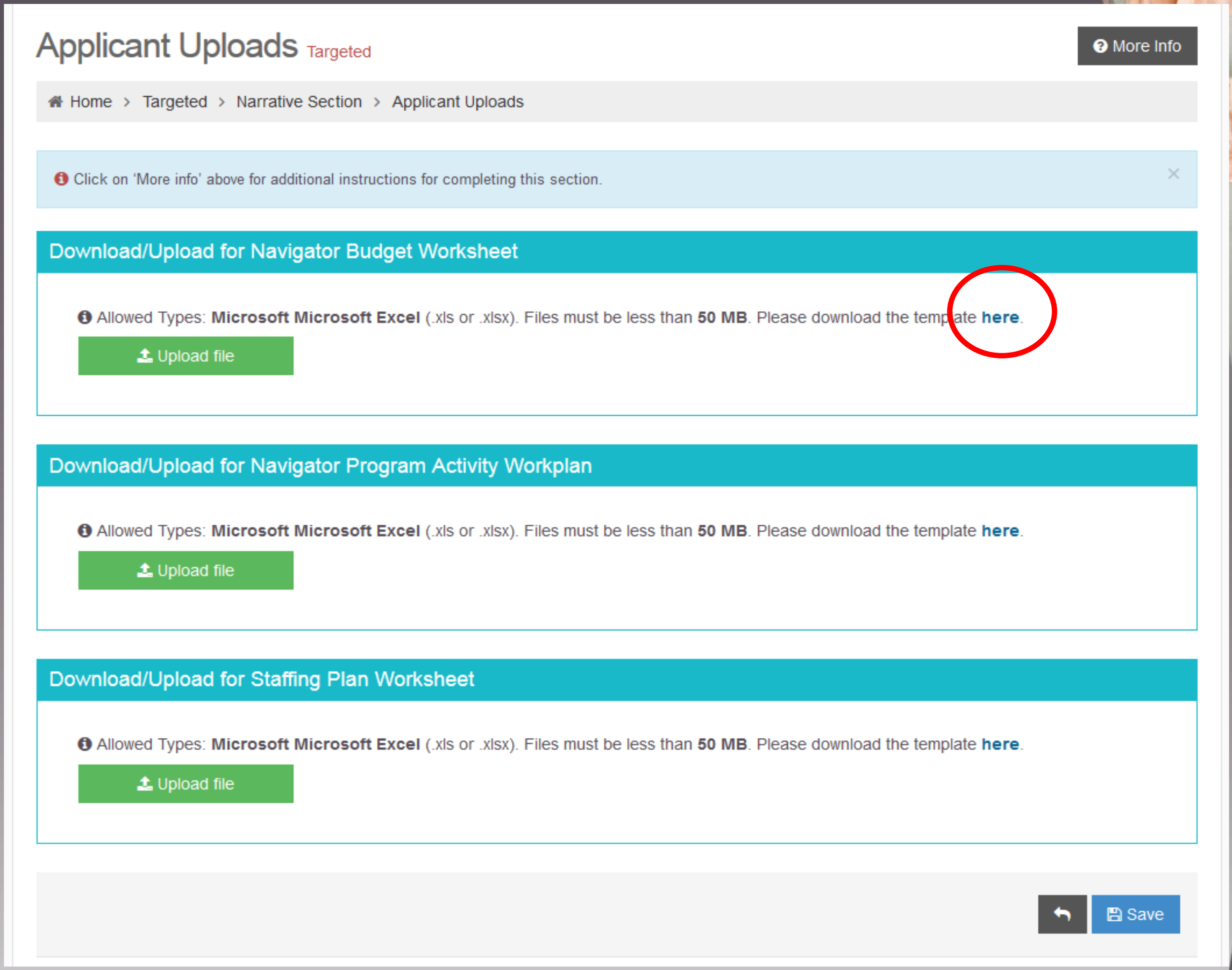
- The Subcontractors added in Section A will be listed in the left column. To assign them to the region application currently in progress, click on the subcontractor name and it will move to the right column and show as assigned to the specific region.
- Any subsequent changes made to the subcontractors in Section A will affect this section.



Applicant Upload Worksheets

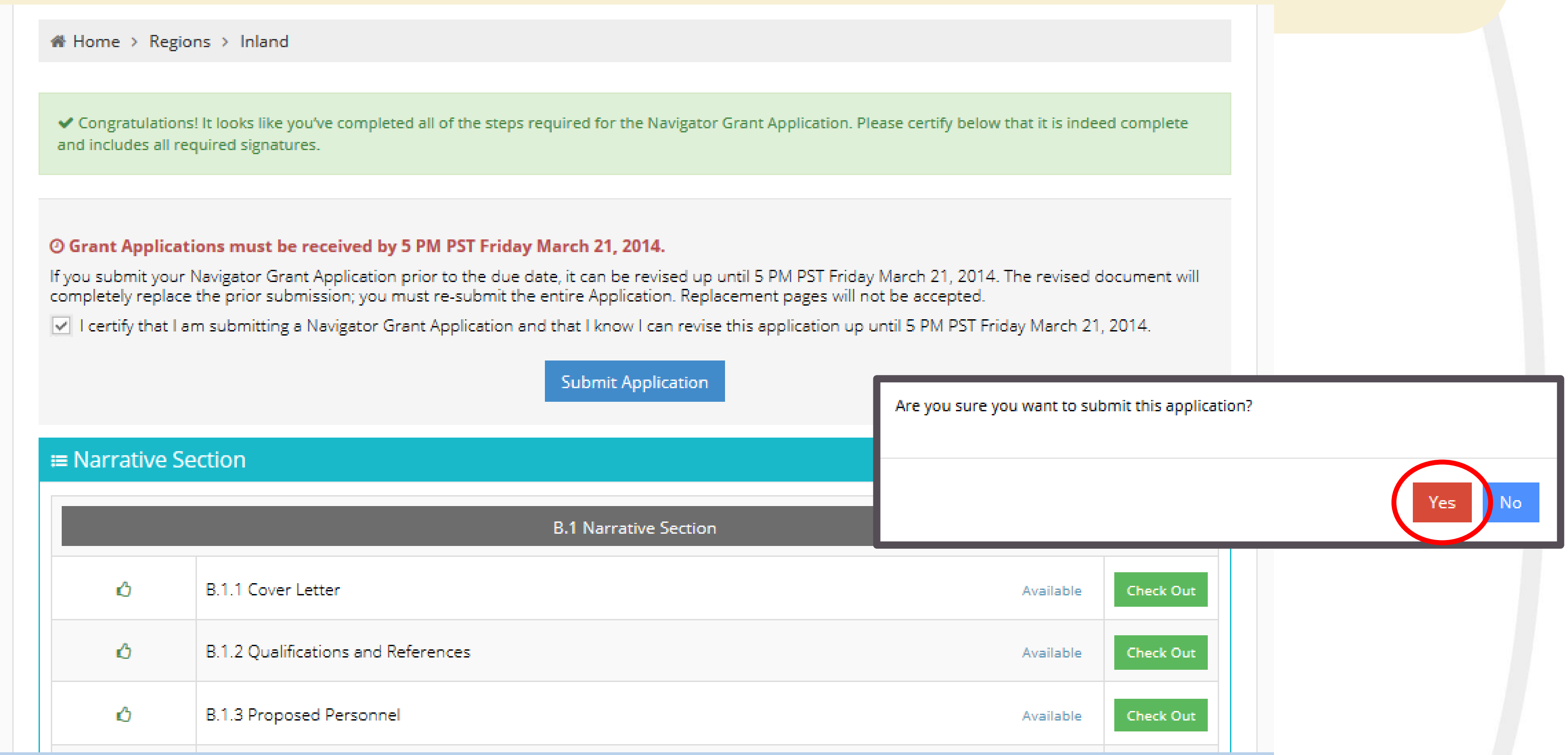


- For each Applicant worksheet, a template is provided. Click the "here" link to download the Excel template to your computer.
- Once the worksheet is complete, it needs to be uploaded back into the application system.
- Click "Upload" and select the worksheet file saved on your computer. The filename will display under the Upload file icon.
- Worksheets **MUST** be provided in Excel format. **PDF** format will not be accepted.



Submit Navigator Grant Application

- When all sections are complete and saved, a green box will appear that indicates the application is ready to submit.
- In the following box, certify that you've read the statement regarding re-submitting applications by the due date, and click "Submit Application."
- Click "Yes" in the confirmation box to submit the Navigator Grant Application.
- **If the applicant does not click the "Yes" for a final submission before 5pm on 3/21/14, the application will not be considered as an on-time submission.**



Submit Navigator Grant Application

For any technical support with the Navigator Grant Program Request For Application, please contact the Grantee Help Desk. This toll free number can be accessed Monday through Friday from 8 a.m. to 5 p.m. at 1-866-622-5252

Questions can also be submitted at: grantinfo@ccgrantsandassisters.org

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Navigator Grant Applications are due by March 21, 2014 at 5 p.m.