The Jacarlene Foundation Online Application FAQs

Bank of America, Philanthropic Solutions hosts and supports The Jacarlene Foundation's online letter of inquiry and grant application.

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General

When do you accept online Letters of Inquiry?

Online Letters of Inquiry are accepted 24-hours a day, 7 days a week. However, applicant inquiries can only be answered via email during normal business hours, **Monday through Friday, 9 a.m. – 5 p.m. EST**. The same support protocol applies to the 2nd stage full application process for invited applicants.

Please be advised that technical support is **not** provided on weekends for password resets or general technical inquiries. Therefore, it is best to start your application early, and to seek technical support during business hours. Technical assistance will be handled during the business hours noted above and password reset requests will typically be resolved within 24 hours.

- Standard password reset support: MS_PrivateBank_Grantmaking@blackbaud.com
- Technical assistance and online grant application account transfers support: grantmaking@bofa.com

What is a Supporting Organization, 509(a)(3)?

Visit the IRS page on Supporting Organizations (https://www.irs.gov/charities-non-profits/section-509(a)(3) supporting-organizations) to learn more.

I do not know my organization's Employee Identification Number (EIN). How can I find it?

An organization’s Employer Identification Number (EIN), also known as a federal Tax Identification Number (TIN), is used to identify a nonprofit entity. An EIN is a unique 9-digit number, for example 123456789 or 12-3456789.

To look up your organization’s EIN, visit the IRS website to access the Tax Exempt Organizations Search tool (https://apps.irs.gov/app/eos/), or contact the Internal Revenue Service Call Center at 1.877.829.5500. If your organization is a religious organization, municipality, subdivision of state or a school, your organization may not be required to have a Federal TIN. If this is the case, leave the Tax ID field blank in the online grant application.

How can I find my organization’s NTEE description as designated by the IRS?

The National Taxonomy of Exempt Entities (NTEE) system is used by the IRS to classify nonprofit organizations. You can search for your organization’s NTEE description on Guidestar (www.guidestar.org). If you find your NTEE description on Guidestar, locate that same NTEE **description** (not the NTEE code) in the search tool of the online grant application. (To do this, select the down arrow in the application’s NTEE search box to view the entire list. To narrow your choices, enter your organization's NTEE description in the search box and select **Search**. Finally, select the down arrow to view the match options. Select the description that best describes your organization. To clear your selection, select **Reset**.)

If your organization is a church, municipality, subdivision of state, or a school, your organization may not be listed on Guidestar. If your organization does not have a NTEE listed, or is not in Guidestar, choose the NTEE description in the dropdown list of the online grant application that most closely matches your organization’s type.

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Navigation

How do I create a new online account?

Creating a Bank of America Private Bank online grant application account enables you to have online access to the MyAccount page which serves as your own online grant application user account. This one account will store all of your in progress applications as well as your submitted grant applications. This account stores both applications and requirements for all of the private foundations managed by the Private Bank.

To create your user account, select the **Apply for a Grant** link on the website. Select the **New applicant** link, enter your email address (or one designated by your organization) and re-enter the email address to confirm. Create a password, confirm it and then select **Continue**. You will be prompted to set up security questions. After setting up your answers, the application eligibility quiz will launch.

Once you pass the eligibility quiz, you will be granted access to the online Letter of Inquiry. You will also receive an account setup email confirmation that will include the URL for the MyAccount sign-in page. This URL enables you to return later to access your in progress applications, or any of your previously submitted applications at any time. In progress and submitted applications are retained on the site for 120 days.

How can I see the application before I get started?

After creating a new account, or logging into an existing one, you may be presented with an eligibility quiz. Once the eligibility questions are answered correctly, you will then gain access to the application. On the Instructions page, you can review the foundation's online application questions in advance by selecting the **Printer friendly version** link. A read-only version of the application will open. Select **File** then **Print** on your browser's toolbar. Answers can then be prepared offline and pasted into the online application at a later time. You must submit your application online. Do not mail the printer-friendly version.

Once I begin the online application, can I save and finish it later?

Yes. After creating an online account, you will receive a welcome email with a unique URL to access your MyAccount page at any time. Retain this email for your records. When working on an application, you may select **Save & finish later** located on every page of the application. You can also access the MyAccount page by using the Return to an application in progress link from the welcome email, or access it from the foundation's website when you are ready to complete and submit your application.

What do I do if the online application is not saving my answers and does not seem to be functioning?

1. Confirm that you are accessing your saved, in-progress application by selecting the Return to an application in progress link. The Apply for a Grant link will just initiate a new, blank application. If you are using the Return to an application in progress link, check 2-8 below for other common causes.

2. Check your connection to the internet. Open a browser and access a website other than the online application form to test your connectivity.

3. Next, check to see if you have a compatible browser installed on your computer. The online application is compatible with **the latest stable** versions of the following browsers for Microsoft Windows 10: Firefox, Google Chrome, Microsoft Edge; and Safari for MacOS 10.12 and newer. If your computer is not fully updated, you may experience difficulty saving answers in your application. It is best to use an updated computer that has a compatible browser. Unfortunately, we cannot diagnose personal computer compatibility issues.

4. Your browser must be enabled to accept cookies.

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5. Your browser cache may be full and therefore reading prior sessions. This can impact the retention of your answers, the stability of your session, and can cause error when resetting your password. You should delete your browser's temp files and cookies. (Search on the internet for cache clearing instructions specific to your browser version and type) Close all of your browsers. If your temp files were not cleared at the time you entered and lost the answers, you may have to enter them again in a new session. After refreshing your browser, return to the foundation's webpage, or the application link provided to your organization, to log in and start your application.

6. Before you fill out the whole application, test the following. If your browser and temp files were recently cleared, close all of your browser windows and then go to your MyAccount page and open the in-progress application. After opening the application, fill in one of the fields on the **About Your Organization** section. Then click **Save & next** to go to the next page which should save your information on the prior page. Then go back to the **About My Organization** page to verify that your test answer saved. If yes, then proceed to fill out the application, occasionally selecting **Save & Next** to save your answers.

7. If you are **not** receiving confirmation emails or password reset emails, your email server may be blocking them. Set up our system's auto email address as a trusted sender: mail@grantapplication.com. (no reply)

8. If you believe that you submitted your application, but received a "saved" email confirmation rather than a "submitted" email confirmation, you may not have selected the final **Submit** button. When you select **Review and Submit** the application Review page will open, but you still have to select **Submit** to fully submit your grant application. Go back to your in-progress application, and open it. Select **Review and Submit** and then **Submit.**

9. If you are still experiencing problems, here is the information we will need in order to trouble-shoot your issue:
   - Identify the browser type and version you are using
   - Provide us with your account email address (Don't send us your password!)
   - Note the foundation to which you are applying
   - Note exactly what steps you took when you encountered the problem
   - Take a screenshot of any error messages that you receive.
   - Send this information to grantmaking@bofa.com

How do I access my user account if I cannot locate my welcome email containing the URL to return to the MyAccount page and my online application?
You can access your online grant application account by pasting the following URL into your browser: https://www.GrantRequest.com/SID_1116?SA=AM. The link is also included in the 2nd stage invitation email, and is also posted on the website: Return to an application in progress link.

I saved the application link in my Favorites, but when I click on it, I'm getting an error. What do I do?
If you save the application URL as a favorite in your browser, note that you should first delete the cookie 'CT=CT&' from the browser address and then save it again in order to access the site successfully. However, it is best to access your **In progress** applications directly from the MyAccount page link.

My email address has changed at my organization. How can I update my existing account on the MyAccount page?
Sign in to your MyAccount page using the email address that was used to originally set up the account and enter the password. At the top of your MyAccount page is a Change email/Password link. Select that link, enter in your new email address and select Update. If you are a new staff member, you cannot edit another user's account. See the next two FAQs regarding sharing account applications, and transferring existing accounts to new staff.

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My colleague and I are working together on an application. How can we collaborate electronically?

To avoid loss of functionality within your applications, it is highly recommended that only one staff member log into the account at any given time. There are collaborative tools within the actions column of the MyAccount portal that can be used to share drafts of applications or requirements with colleagues. There is an icon to enable sharing of a *view only* copy of the application-**Viewers**, as well as an option to **Transfer an application/requirement** to a new owner. When transferring to a new owner, or sharing a *view only* copy, a new account is automatically set up if the user does not yet have one. The new owner must accept the request and complete the account set up.

What do I do if there was a previous staff person working on the application who has since left our organization?

If you know the previous staff person's email address, we may be able to transfer your organization's historical applications and requirements to the new account for your organization. If you would like to request a transfer, email us at grantmaking@bofa.com. It is best to set up a new organizational account prior to requesting a historical application transfer. The instructions for setting up your new account are on the top of page 3.

To request a historical transfer of grant applications: Please include the name of your organization, your name and email address, the foundation to which you are applying and the email address of the prior staff person. If you do not have the prior staff person's email address, we may be able to look it up for you.

Why do I not see an application that I submitted recently on the MyAccount page?

There is a drop-down arrow on your MyAccount page where you can select either **In progress** or **Submitted applications**. If you saved or submitted the application correctly, you will be able to access applications in either status by selecting one of the two options. If you believe that you submitted your application, but you still find it in the **In progress** folder, you may have only selected **Review and Submit** when you last worked on the application which only opens the Review page. Open the **In progress** application and select **Review and Submit** and then **Submit**. You will receive an email confirmation of the submission and a message on your MyAccount page indicating the application was submitted successfully.

Process

What are the recommended steps to take before filling out an online grant application?

- Thoroughly review the foundation's Guidelines and Procedures on the website. Carefully review the materials to ensure that your grant request is in alignment with the foundation's Areas of Interest.
- Review the foundation's online application questions in advance. To do this select **Printer friendly version** on the application page. It is recommended to prepare answers offline in a Word document and then paste the answers into the online application later because the application will time out during times of inactivity.
- Review the list of required attachments. Prior to beginning the application, prepare the required documents for upload. PDF, Word or Excel are all acceptable electronic formats, but PDF is preferred, specifically for budgets. Each attachment must not exceed 25 megabytes, must not have multiple tabs, and cannot be password protected.
- Make sure that your attachment file names do not use special characters such as apostrophes and dashes which can impact our ability to successfully import attachments.
- Do not use all caps, or insert tables, charts and/or columns into your application responses.

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Before I apply online, I would like to see the application questions. How can I get a copy?
In order to obtain a copy of a foundation's application, select Apply for a Grant. Sign into your existing MyAccount page, or set up an account by clicking on the New Applicant link. After you log in, complete the quiz and then you will be presented with the application. Next, select the Printer friendly version link at the top of the application page. Select File and then Print from your browser menu.

What happens if I do not answer a required question marked with an asterisk?

All required information on the application is indicated with a gray asterisk. You will not be able to submit your application until all of the required questions have been completed. When you click **Review and submit** at the end of the application, you will be presented with a list of required, but incomplete fields, if applicable. Once all required fields are completed, click **Update** at the end of the application. You will also be required to **label & upload** all attachments before submission, if attachments are required.

How does the Letter of Inquiry and Full Application process work?
Once you submit your Letter of Inquiry, the Trustees will review and determine which organizations are invited to submit a full application. Organizations will be notified via email which will contain a link to the full application. The Full Application will prefill the contact information and Letter of Inquiry narrative answers which can then be edited if necessary. There will also be new, additional questions added to the Full Application in addition to required attachments. Use the Printer Friendly Version link to print out the Full Application to prepare your materials prior to working on the electronic form. The electronic form will time out after 30 minutes of inactivity, so make sure to save your answers frequently in he forms by selecting **Save and Next**.

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What are the sections of the online grant application?
The Jacarlene Foundation has two distinct formats depending upon the stage of the application.

The **LOI** is comprised of the following sections:

1. Instructions
2. About Your Organization
3. Letter of Inquiry Detail
4. Review My Application

The **2nd stage, Full Application** is comprised of the following 6 sections:

1. Instructions
2. About Your Organization
3. About Your Request
4. Goals, Outcomes & Acknowledgement
5. Attachments
6. Review My Application

Can I move between sections of the application without completing all required fields first?
There is a chevron meter at the top of the application that allows you to toggle through the pages of the application by clicking on each chevron page title. This will allow you to jump to different sections of the application while saving any data entered on the prior page. The **Save & Next** button will allow you to progress directly to the next page and save information as well.

Do application text fields have word limits?
Many of the long text fields in the applications utilize a word limit. The text fields that have word limits present a word counter that allows you to track the number of words used in each of your answers.

How do I print a submitted application?
The MyAccount page lists both your in progress and submitted grant applications which can be accessed by choosing in progress applications or submitted applications in the **Show** dropdown list. If you would like to print a submitted application, open the submitted application by double clicking it, and then go to **File** and then select **Print**. This prints an html version of the application.

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Attachments

What are the required application attachments and where can I find more detail? The required attachments include:

1. Board List
2. Organizational Budget
3. Project Budget (required if submitting a project or program request)
4. Financial Statements (audited, reviewed or compiled by independent auditor)
5. IRS Determination Letter
6. Articles of Incorporation

More detail regarding the attachments is provided within the attachment section of the application. All attachments must include the organization's name and specific attachment label in the attachment title. If an attachment includes multiple pages, please include page numbers.

Can I attach or include other materials beyond the required attachments?

Do not include materials other than the required attachments listed in the online application. We will contact you for additional information if necessary.

What file formats are accepted for attachments?

PDF is the preferred electronic format for attachments, however word and excel are also accepted on most applications. PDF is preferred for budgets however. Do not send materials other than what is requested. Note that each attachment must not exceed 25 megabytes in size and must not be password-protected. If an attachment has multiple pages, upload it as one document. All attachments must include the specific attachment name, page numbers, your organization’s name and the foundation’s name to which you are applying.

What if I do not have the required attachments in an electronic format?

Attachments must be submitted electronically. Applications that do not include the required attachments cannot be submitted. If you do not have the documents prepared at the time you reach the attachments section of the application, select **Save and finish later** to save and exit out of your application. You can then prepare the attachments offline, and then return to your application in progress when you are ready to upload the required documents.

If you do not have the required documents electronically, scan the documents into PDF files. If you do not have a scanner at your organization, we recommend you use the services of a copy shop or a public library.

I uploaded the required attachments, but the system is indicating that they are missing. Why is that?
Check the system labels on your uploaded attachments in your application. If they all have the same label, e.g. (Board List) that indicates that the proper label was not chosen from the drop down list provided in the attachment upload tool. Delete the mis-labeled attachments and try again. Select the proper attachment label from the drop down box. Click the browse button and locate your document and select **Open** or **OK** and then **Upload**. Repeat the process for each document.

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Submission

How do I submit my application once I am done?

Once all of the application fields have been completed and the attachments are uploaded, you can click on the **Review & submit** button on the bottom of the attachments page. Once you have reviewed your application, click the **Submit** button.

If fields are incomplete, you will receive a message indicating which fields need to be completed before you can submit your application. Once your application has been submitted, no changes will be able to be made. Your submitted application will be stored for 120 days on your MyAccount page.

Click **Review my application** in the progress meter and it will display the information you entered and will highlight missing information, or missing required attachments. The site will not allow you to submit your application until the required information is completed and the required attachments have been uploaded.

How can I view or get a copy of my completed application before I submit it?

There are several ways to view, save and/or print your application before submitting.

- Click **Printer friendly version** then go to **File** and **Print**
- Click **Printer friendly version** then select **File/Send (Page by email)** to send the printer-friendly version to your email address
- Click **Printer friendly version** and select **Save As (HTML)** to save the file on your desktop. You can also view or print the application after it has been submitted from the submitted applications section of your MyAccount page.

How will I know if you received my application?

Once you submit your application and it is received by our organization, you will be brought to your MyAccount page which will display the following message: “Thank you! Your application has been submitted.” You will see your submitted application listed under the **Submitted applications** section of your MyAccount page. You will also receive an email and a copy of your application confirming that the application was successfully **submitted**. If the confirmation email states that your application has been Saved, but does not specifically say Submitted, that means you probably have to open your application in your MyAccount’s In-progress folder and Select **Review & Submit** and then **Submit**.

When will I be contacted about the status of my grant request?

We regret that we cannot respond to individual inquiries regarding the status of applications and appreciate your patience with the process. You will be notified of the status of your application via email
We will follow up for additional information if necessary. The status of applications is not posted online.

Do you accept grant applications after the due date?

Letters of Inquiry are accepted on a rolling basis. If your organization is invited to submit a full application, the deadline date will be noted in your invitation email. Please submit online applications by 11:59 p.m. on the day of the foundation's deadline date. If the deadline falls on a weekend or a federally recognized holiday, applications are due on the next business day by 11:59 p.m.

While online applications may be submitted on the weekends, please be advised that technical support is **not** provided on weekends for password resets or general inquiries regarding the online forms. Therefore it is best to start your application early, seek technical support during business hours, and to submit your application in advance of the due date. Technical issues can be reported to grantmaking@bofa.com and we will respond during business hours.

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