



## **Grantee Instructions**

### *Register the Organization and Contact*

1. Click on this [link to register](#)
2. Enter your EIN or a partial organization name
3. Click Next
4. If the EIN has already been registered in our system, contact [Anna Lindgren](#)
5. Click on the Registration Link
6. Enter the EIN and the Organization Legal Name
7. Click on the Guidestar button to automatically populate fields with information based on your Guidestar record
8. Complete all other fields
9. Be certain to store your password in a safe, secure place for future reference
10. Click Save, OK
11. From the next page, you **MUST** choose a proposal **BEFORE** closing the window or downloading the instructions. The instructions are also included below.

### *Start a Proposal*

1. Clicking on the proposal type will take you to the Grantee Portal login screen
2. Enter your user name and password
3. Bookmark or favorite the [Grantee Portal](#) in your browser so that you can easily access it in the future
4. Be **CERTAIN** to Save the form before closing the window so that you can come back and complete it at a later time.

### *Accessing the Proposal or Renewal Form*

To access the form once saved.

1. Login to the grantee portal
2. If needed, click on My Submissions
3. Find the request that is editable, and click on the Edit button on the far left
4. Complete the Narrative section
5. You may use RTF (Rich Text Format)
6. Click Save

### *Contacts*

Follow the instructions below, and a screencast is also available [here](#).

1. Click on the Contacts tab
2. Each request must list three roles:
  - Proposal Contact (Person completing the form)
  - Project Contact (Person leading the project)
  - Award Letter Contact (The person who, if awarded, should receive the grant\*)
3. In some cases, the contacts may already be listed.
4. One of those contacts must also be set as the Primary Contact. Please add that Contact first, or if they already are displayed in the Existing Contact Role list, click on Edit and check the “Is Primary” checkbox.
5. To add contact roles, first search for them by clicking on the magnifying glass and entering their first or last name, and click go.
6. If the contact is found:
  - a. Click on the name of the person
  - b. Select their role
  - c. If needed, mark them as Primary
  - d. If you’d like them to have access to the portal, check the box
7. If the contact is not found:
  - e. Click New
  - f. Fill in the information
  - g. Click save
  - h. Select their role
  - i. If needed, mark them as Primary
  - j. If you’d like them to have access to the portal, check the box
8. For some smaller organization, the same person may be assigned to each of the roles
9. Once all the contacts have been added, click continue

\*Fiscally sponsored projects, please list your fiscal sponsor contact here

#### *Attachments*

1. Add the attachments as requested
2. Click Select
3. Navigate to the file you want to upload
4. Click Upload
5. You may also delete and replace files
6. Please note that files will be renamed to Campbell Foundation naming conventions once uploaded. This will not affect your original file.
7. When complete, click continue

#### *Review & Submit*

1. Please Review your work
2. Click on the appropriate tab to edit information

3. To Print a copy of your request, click on the print button
4. The print version will include a list of file attachments