

## REGISTRATION AND LOGIN INDIVIDUALS

**Returning users:** Log in to the system using your e-mail address and password. Please do **not** create a second, new user account. There is a system prompt to assist you if you need a password reminder.

**New users:** Register by clicking "Create New Account" on the login page.

**\*\*For the purposes of this grant portal, your Organization Name should be your last name, and the Organization EIN/Tax ID should be n/a.**

### THE REGISTRATION PROCESS

The registration process has three sections: (1) organization information, (2) your individual user information and (3) choosing your individual user password. The registration process is straightforward; however, in some cases, it may be more complex when certain factors apply:

Each individual user/e-mail address is linked to a single organization, so if you are submitting applications for more than one organization, you will need to register separately using a different e-mail address for each organization. For example, if you are a part-time staff member at both Organization A and Organization B, and would like to submit applications for both organizations, you will need to register using one e-mail address for Organization A's application and another e-mail address for Organization B's application.

During the registration process, you cannot save partial information; therefore, you should gather all required information before beginning the registration process.

Your user account ID is your e-mail address. You may choose to bookmark the login website address.

You will receive a pop-up notification if your organization has a profile in the system. Continue to complete the information as requested, and OPERA America staff will merge the organizational accounts, giving you access to all grant information within your organization.

### UPDATING YOUR REGISTRATION INFORMATION

To update your user information, click on your name at the top right corner of the screen and select "Edit Profile" from the drop-down menu.

### THE APPLICATION PAGE

After you have registered, you will be directed to the Application Page. On the left side of the screen you will see "Request" and two options underneath:

- **Dashboard** — (Application Status Page): This screen is your home page where you can check the status of your grants. This page will display the form you just completed, the status of the form and the next form in the process.
- **Apply** — (Application Page): This screen lists the available grants and is the portal to apply.

### NAVIGATING THE ONLINE GRANT MANAGEMENT SYSTEM

- **Apply for a grant** by clicking "Apply" in the menu at the left side of the screen.
- **Manage your grant application** by clicking "Dashboard" in the menu at the left side of the screen. The Application Status Page provides information regarding the status of open grant applications. From this page, you can download completed application forms and see the status of an application form you have submitted. If you

have saved but not submitted an application form, you must access the form on this page to complete and submit the form.

- **Manage your awarded grants** by clicking “Dashboard” in the menu at the left side of the screen. The Application Status Page provides information regarding awarded grants. From this page, you can see whether or not a grant has been awarded and complete required follow-up forms for awarded grants. The term “follow-up” describes an upcoming or pending event, such as a report that is due or an upcoming meeting, initiated by OPERA America.

## **UPLOADING FILES**

- In general, the **acceptable file types** for uploading files are: Microsoft Word/Excel and PDF s.
- Only **one file can be uploaded per question**. Multiple documents must be combined into one file and then uploaded.
- If the document(s) that need to be attached to your form are not electronic or you need to combine multiple documents into a single file, our online system gives you the option to “**Fax to File.**” The easy-to-use tool will convert documents from hard copy to a PDF.
  1. Click “Fax to File” in the menu at the left side of the screen and read the instructions.
  2. Select “Request a Fax #”; a toll-free number will appear on the page.
  3. Load a document, or multiple documents that need to be consolidated, into one file, into your fax machine.
  4. Dial the toll-free number. Send a separate fax for each individual file you wish to create.
  5. When you are done, select “Finished Faxing” to see your list of files.

## ONLINE SYSTEM TIPS

### THINGS TO KNOW

- You may download a list of questions by clicking the **Questions List** in the top right corner.
- The **character counter** includes spaces as well as characters.
- A user will be **automatically logged out** of the online system after 90 minutes of inactivity. The user will receive a warning message after 80 minutes of inactivity. Working on a form without saving does not count as activity.
- Please remember to **regularly save your work**. The system will autosave every 20 minutes.
- You may choose to **prepare your response in a document outside of the online system (e.g., Microsoft Word)** and then copy and paste the text into the online form. If you prepare your application in this way, be sure to keep track of character limits. As noted above, character limits include spaces and characters. We recommend that you do not use formatting tools, as available in Microsoft Word, because the formatting will likely not transfer to the response area when pasted into the online system. *Paste all information as plain text.*
- It is advisable to download copies of all **submitted forms** to your computer.
- If you do not provide an answer for one of the **required questions**, you will not be able to submit your application.
- If your **PDF upload exceeds the maximum file size**, consider using the Adobe Acrobat option to "Reduce File Size" (look at the options in Document).
- Remember to **click "Submit Form"** when you are finished.
- **Once your application has been submitted**, it is no longer available for editing. If you need to make a correction to a submitted form, contact [Grants@operaamerica.org](mailto:Grants@operaamerica.org).