



All technical questions in regard to navigating PBF's online forms and account portal are detailed in this guide.

ONLINE APPLICATION & LETTER OF INTENT (LOI)

GUIDELINES

Before starting a Community Grant application, Major Grant Letter of Intent (LOI), or Signature Grant Letter of Intent (LOI), review <u>ALL guidelines</u> on PBF's website and, if needed, schedule a call with the Foundation at <u>Foundation@Provident.Bank</u>.

CHANGE OF INFORMATION

If there has been a change in leadership, change of address, or another change to your organization's contact information, please email the Foundation at <u>Foundation@Provident.Bank</u> so we can update our database.

NAVIGATING THE PROVIDENT BANK FOUNDATION'S WEBSITE

• Click on the **GUIDELINES** tab and review all guidelines, rules, and requirements.



• Once reviewed and ready to start the application/LOI, click on the **APPLICATIONS & FAQs** tab, then select **Applications** from the menu.



• If you have any questions, refer to the **Frequently Asked Questions** link in the menu.

Provident FOUNDATION	ABOUT	GUIDELINES	APPLICATIONS & FAQs	PROGRESS REPORTS	O. MEDIA	CONTACT US
	N/1 N/1		Applications equently Asked Question:			
			FAQ Guide	to Naviga	ting Onl	ine Forms 2



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PREPARING TO APPLY

• It is imperative that you read through the IMPORTANT INSTRUCTIONS FOR SUBMITTING A REQUEST section prior to scrolling down to each grant opportunity link.

	● Provide				APPLICATIONS	PROGRESS	c	CONTACT US
	FO	UNDATION	ABOUT	GUIDELINES	& FAQs	REPORTS	MEDIA	LIBRARY
				Fre	Applications equently Asked Question	s		
					NSTRUC NG A RE			
		 Refer to the our online s Failure to fo Please read Ensure all a Community year. Turn-a Major Gran applicable of 	FAQ GUIDE f system. allow direction and follow al pplicable sup Grant reques around time for t and Signatu	for instructions and ns may result in rec l instructions and o porting materials a sts are accepted ar or disposition is no re Grant LOIs and	d through the applica d any questions you r quests being denied. deadlines carefully. re attached. nd reviewed on a rolli more than 90 days. applications will be re IES page. If you have	nay have in regaining basis through	rds to nout the	
ind ink Port ind	ou have already starte you would like to co will take you to you al. You will need to l password you created upplication/LOI.	mplete your Account In log in using	draft, this formation the email		tated deadlines. responses within 90 requirements from p			
				and a second	ted an application or and access your dra			



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- Links are provided to access each grant request this includes the Community Grant application, the LOI for the current Major Grant cycle, and the LOI for the current Signature Grant focus area.
- Click on the APPLY NOW button under the GET STARTED tab for the grant you are applying for.

*IMPORTANT: Major and Signature Grant applications are <u>by invitation only</u> and can only be accessed with a unique link. Only if you have been invited to submit a formal application will the link be made available (by way of an email from PBF).

	ABOUT	GUIDELINES	APPLICATIONS & FAQs	PROGRESS REPORTS	MEDIA	CONTACT US
fro re ch Ba dis 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	2018, reques om \$1,000 up viewed on a r arity organizat idelines and l nk Foundation sposition is no Community gr PBF will use its days after the Drganizations All applications and applicable s Failure to follo	ts for a Commun to and including rolling basis thro tions are eligible t have not received in the same cale more than 90 day ant applications a best efforts to co receipt of grant ap may only apply fo s must be submitt supporting materi ow directions may	& FAQs ITY GRA ity Grant will provi \$5,000. These requires ughout the year. 50 o apply as long as th prior funding from " ndar year. Turn-arout ys. re reviewed on a rol mmunicate respons	REPORTS	MEDIA	
	and any quest	ions you may have	e in regards to our o	nline system		

NAVIGATING THE ONLINE APPLICATION/LOI

Follow these instructions to learn how to sign in, apply, submit, save and retrieve draft applications.

*IMPORTANT about saving your application:

• To save your application as a draft, click on the SAVE DRAFT button at the bottom of the page.



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- Each time you save a draft, an email of your saved application will be sent to the email address associated • with the Account Information Portal. You may add additional email recipients.
- Your account will time out after 45 minutes of inactivity. Any work not saved during that time will be ٠ lost.

LOGIN PAGE

Please Sign In

- If you are a new applicant, create an account by selecting "New Applicant?"
- If you forgot your password, click "Forgot Password?" before contacting PBF. Please remember to check your junk/spam folder. If you do not receive an email within 24 hours, please email Foundation@Provident.Bank and ask for your password to be reset. When you email PBF, please make sure you provide the correct email address associated with the account.
- Your email address must be associated with your 501(c)(3) organization. ٠

		Contact the	Foundation PBF Website	Exit/Lo
Please Sign In				
 If you have an account, please log in using your e-mail add 				
 If you are a new online applicant, please create an account If you have forgotten your password, click the "forgot pass 				
If you have questions for The Provident Bank Foundation, of				
E-mail	Password			
New Applic	cant?	Forgot Password?		
	Login			

Enter your Tax ID: This information can be found on www.Guidestar.org under the IRS Business Master File or in your organization's IRS Letter of Exempt Status.

All organizations must be recognized by the IRS as a 501(c)(3) public charity organization under the Internal Revenue Code and are determined to be exempt, and which are classified as public charities and not "private foundations" under Sections 509(a)(1) or (2) of the code in order to receive funding offered by The Provident Bank Foundation (PBF). If you have any questions regarding the Eligibility Quiz or your Tax Status, please review the Detailed Guidelines located on our website and visit www.guidestar.org.	
Please enter your Tax ID: OK	



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ELIGIBILITY QUIZ

You will be prompted to complete the Eligibility Quiz every time you sign in. Any questions about your organization's eligibility can be found on PBF's website under the <u>Guidelines tab</u>.

Organizations applying to PBF for funding must be recognized by the IRS as a 501(c)(3) public charity organization and be determined to be exempt, and which are classified as public charities and not "private foundations" under Sections 509(a)(1) or 509(a)(2) of the code.



ELIGIBILITY QUIZ Organizations seeking funding from The Provident Bank Foundation must be determined as exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code and as an organization described in Section 509(a)(1) or 509(a)(2). Organizations must also work in one or more of three main categories: community enrichment, education, and/or health, youth and families. What is your organization's reason for Non-Private Foundation status? All organizations must be recognized by the IRS as a 501(c)(3) public charity organization under the Internal Revenue Code and are determined to be exempt, and which are classified as public charities and not "private foundations" under Sections 509(a)(1) or (2) of the code in order to receive funding offered by The Provident Bank Foundation (PBF). -Select One- 🗸 2. Is your organization located in New Jersey or Eastern Pennsylvania? -Select One- 🗸 3. In what New Jersey or Eastern Pennsylvania county is your organization located? -Select One- 🗸 4. Are you a religious organization seeking funding that benefits your membership or congregation only -Select One- 🗸 5. Are you a political organization, including one that may be perceived as political or have portions of its program deemed political in nature by the Provident Bank Foundation? -Select One- 🗸 6. Have you received funding from The Provident Bank Foundation in this calendar year? -Select One- 🗸 7. If you have received funding from The Provident Bank Foundation in the last two years, have you submitted all required reports? -Select One- 🗸 Submit

Community Grant Guidelines | Contact Us | Guidestar FAQ | Exit



All technical questions in regard to navigating PBF's online forms and account portal are detailed in this guide.

APPLICATION/LOI

Remember to review the Guidelines as well as the Assessment Criteria for the request you are submitting to help through the application/LOI.

- A. You can click on each tab to move forward with the application/LOI, or to go back to a previous section.
- B. Please reference the links under the PBF logo for any questions you have regarding the grant guidelines or to contact the Foundation.
- C. If you need to print or email a draft of your application/LOI, please use the links provided on the form.



Attachments: Review the grant Guidelines to learn more about the required attachments. If you have any issue uploading documents, email the Foundation at Foundation@Provident.Bank.

- Our system accepts **PDF** documents <u>only</u>.
- Use the drop-down function to sync your documents with the corresponding attachment.
- Be sure to hit the **Upload** button after selecting the document.

Attachments Use the drop-down function below to attach each required document. If you experience any issue uploading documents, e-mail the Foundation at Foundation Required (file format must be PDF): • Itemized program/project budget and budget narrative • Organization's annual budget • Most recent Form 990 • Most recent audited financials • Board of Directors and affiliations Optional (file format must be PDF): • Achievements over the past 3 years • Logic model	@Provident.Bank.	
Supporting program material, specific to the request Upload The maximum size for all attachments combined is 50 MB. Please note that files with ce	rtain extensions (such as "exe", "com", "vbs", or "bat") cannot be uploaded.	
Title: Itemized program/project budget and budget narrative (Required)		
	FAQ Guide to Navigating Online Fo	orms 7



All technical questions in regard to navigating PBF's online forms and account portal are detailed in this guide.

Review and Submit: Be sure all information is accurate and correctly spelled, that the certification page has been signed by management, and that all required documents have been properly attached. Click **SUBMIT Application**.

- Once the application/LOI has been submitted, you are unable to make any changes.
- A confirmation email from the system containing your complete application/LOI will be sent <u>immediately</u> <u>after submission</u> to the email address associated with the Account Information Portal.
- A second confirmation email will be sent from PBF. For Community Grants, allow five (5) business days for confirmation from PBF. For Major and Signature Grant LOIs and applications, allow 10 business days for confirmation from PBF.
- If you do not receive confirmation emails within the stated timeframes, return to your Account Information Portal (as described on page 3) to ensure your application/LOI was submitted.



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ACCOUNT INFORMATION PORTAL

ACCESSING YOUR ACCOUNT

To access your account in order to see DRAFTS and SUBMITTED APPLICATIONS, visit the <u>Applications page</u> on our website or click: <u>https://www.GrantRequest.com/SID_1251?SA=AM</u>.

You will be prompted to log into your account using the email address and password associated with the Account Information Portal.

Once logged in, a new screen will appear (shown below). This page defaults to **In Progress Applications**. This is where you can access your application DRAFTS.

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	Change E-mail/Password				Contact the Foundation	PBF Website Exit/Log-Out
Last Log in: 12/28/2017 11:21 AM GMT-05:00						
Applications Requirements Applications For access to submitted or draft applicat	ions, select "Submitted Applications" fro	om the show drop-down menu	I on the right	t side of the page.		
					Shaw In	Dragrage Applications
					Show In	Progress Applications 🗸
					🗌 Hide	Viewer Only Applications
Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Sample Application Name	Sample Project Title	1234.00	1234	05/15/2014		😫 前 💷

IN PROGRESS (DRAFT) APPLICATIONS

Transferring a draft application: Click on the people icon to transfer an application. A prompted email will appear to send to the person who will be taking over the application.

			\searrow			
ount: samantha.plotino@provident.bank Log in: 12/28/2017 11:21 AM GMT-05:0					Contact the Foundation	n PBF Website Exit/Log-O
Applications						
Applications Requirements					、	
Applications	cations, select "Submitted Applications" from	n the show drop-down men	u on the right	side of the page.		
Applications	cations, select "Submitted Applications" from	n the show drop-down men	u on the right	side of the page.	Show	In Progress Applications 💌
Applications	cations, select "Submitted Applications" from	n the show drop-down men	u on the right :	side of the page.		In Progress Applications
Applications	cations, select "Submitted Applications" from Project Title	n the show drop-down men Requested	u on the right : ID	side of the page.		
Applications For access to submitted or draft applic			_			de Viewer Only Applications



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ansfer to new o	wner
*Your Name	
Your E-mail	samantha.plotino@provident.bank
*E-mail	Check Email
*Subject	Application Ownership Transfer
lemo to New Owner	Dear Grantee, This message is to notify you that ownership of Application «Application_ID» has been transferred to you. You must accept transfer of ownership in order to complete this process. Please login to complete the application. You can login to your account, «Account_Login_URL», at any time. NOTE: If you are a new user, a separate email will be sent to you with the login web page and your initial password. For security reasons you will be asked to change the password when you first log in. Maximum (5000) characters * Required Transfer Cancel

Deleting a draft application: Click on the trash can icon to delete an application. A pop-up will appear to confirm you want to delete the application.

Account: samantha.plotino@provident.bank Last Log in: 12/28/2017 11:21 AM GMT-05:					Contact the Foundation	PBF Website Exit/Log-Out
Applications Requirements Applications For access to submitted or draft app	lications, select "Submitted Applications" fron	n the show drop-down men	u on the right	side of the page.		Progress Applications
Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Sample Application Name	Sample Project Title	1234.00	1234	05/15/2014		



All technical questions in regard to navigating PBF's online forms and account portal are detailed in this guide.

Sharing a draft application: Click on the envelope icon to send a copy of the application. A prompted email will appear to send to the person who will be reviewing the application.

Account: samantha.plotino@provident.bank Last Log in: 12/28/2017 11:21 AM GMT-05:00				\searrow	Contact the Foundation I	PBF Website Exit/Log-Out
Applications Requirements Applications For access to submitted or draft applic	ations, select "Submitted Applications" fro	m the show drop-down menu	ı on the right	side of the page.		
						ogress Applications 🔽
Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Sample Application Name	Sample Project Title	1234.00	1234	05/15/2014		

*Your Name	
*Your E-mail	samantha.plotino@provident.bank
Recipient E-mail(s)	
	To send to multiple e-mail recipients, separate e-mail addresses with commas. A maximum of 10 recipients is allowed.
*Subject	Copy of «Form_Type»
	I would like to share the attached «Draft_Submitted» «Form_Type» with you.
	Maximum (5000) characters * Required
Send me a copy	
Attach Application	
	Submit Cancel



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SUBMITTED APPLICATIONS

Once you click the SUBMIT Application button, you are able to review it in your Account Portal. However, once submitted, no changes can be made to the application. Submitted applications cannot be deleted. The only functions allowed are to transfer or share the application.

After submitting an application/LOI, you will receive two (2) confirmation emails: one sent <u>immediately after</u> <u>submission</u> from the system containing your complete application/LOI, and the second directly from PBF. For Community Grants, allow five (5) business days for confirmation from PBF. For Major and Signature Grant LOIs and applications, allow 10 business days for confirmation from PBF. If you do not receive confirmation emails within the stated timeframes, return to your Account Information Portal (as described on page 3) to ensure your application/LOI was submitted.

To see your submitted applications, select Submitted Applications in the "Show" drop-down menu.

Account: samantha.plotino@provident.bank Ch	ange E-mail/Password				Contact the Foundation PBF	Website Exit/Log-Out
Last Log in: 12/28/2017 11:21 AM GMT-05:00 Applications Requirements Applications For access to submitted or draft application:	s, select "Submitted Applications" from	the show drop-down menu	on the right	side of the page.	Submitte	ess Applications ed Applications ar Only Applications
Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Sample Application Name	Sample Project Title	1234.00	1234	05/15/2014		Ŵ

Transferring a submitted application to a new owner: Click on the transfer icon, as shown below. This will bring you to a prompted email to send to the person who will be taking over the application.

					\backslash	
unt: samantha.plotino@provide					Contact the Foundation	PBF Website Exit/Lo
Log in: 12/28/2017 11:21 AM G	MT-05:00				\backslash	
Applications Requirements					\	
Applications Applications For access to submitted or dra	aft applications, select "Submitted Applications" fro	m the show drop-down menu on the	right side o	f the page.		bomitted Applications 🔽
Applications	-	m the show drop-down menu on the Requested	right side o	f the page. Submitted		



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ransfer to new o	wner	
*Your Name		
Your E-mail	samantha.plotino@provident.bank	
*E-mail	Check Email	
*Subject	Application Ownership Transfer	
emo to New Owner	Dear Grantee, This message is to notify you that ownership of Application 36441 has been transferred to you. You must accept transfer of ownership in order to complete this process. Please login to complete the application. You can login to your account, «Account_Login_URL», at any time. NOTE: If you are a new user, a separate email will be sent to you with the login web page and your initial password. For security reasons you will be asked to change the password when you first log in.	
	Maximum (5000) characters * Required	
	Transfer Cancel	

Sharing a submitted application: Click on the envelope icon to send a copy of the application. A prompted email will appear to send to the person who will be viewing the application.

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Account: samantha.plotino@providen					Contact the Foundation	PBF Website Exit/Log-Out
Last Log in: 12/28/2017 11:21 AM GM	1T-05:00			\mathbf{i}		
Applications Requirements Applications For access to submitted or dra	ft applications, select "Submitted Applications"	from the show drop-down menu on the	right side of the	a page.		mitted Applications 🔽
Application Name	Project Title	Requested	ID	Submitted	My Role	Action
TEST Application	Test application #2	1	36441 1	0/31/2017	Owner	🔐 💣 🖃



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Send E-mail	
*Your Name	
*Your E-mail	samantha.plotino@provident.bank
*Recipient E-mail(s)	
	To send to multiple e-mail recipients, separate e-mail addresses with commas. A maximum of 10 recipients is allowed.
*Subject	Copy of Application
Message	I would like to share the attached Submitted Application with you.
	Maximum (5000) characters *Reguired
Send me a copy	Submit Cancel



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PROGRESS REPORTS

ACCESSING YOUR ACCOUNT

To access your Progress Reports (also known as "requirements"), click on the **PROGRESS REPORTS** tab or go to <u>https://www.GrantRequest.com/SID_1251?SA=AM</u>.

				C	CONTACT US
ABOUT	GUIDELINES	APPLICATIONS & FAQs	PROGRESS REPORTS	MEDIA	RESOURCE LIBRARY

You will be prompted to log into your account using the email address and password associated with the Account Information Portal.

Once logged in, a new screen will appear (shown below). This page defaults to **New Requirements**. To navigate between New Requirements, In Progress Requirements, and Submitted Requirements, use the "Show" drop-down menu.

	ccount: samantha.plotino@ ast Log in: 12/28/2017 11:2		ge E-mail/Password				Contact the Foundation	PBF Website Exit/Log-Out
La	asi Log In. 12/20/2017 11.2	21 AWI GW11-05.00						
	Applications Requir	rements						
	Requirements							
	For access to submitte	ed or draft requirements,	select "Submitted Requirements" from the s	how drop-down men	u on the right sid	e of the page.		
					-			▼
								w Requirements Progress Requirements
							L I Sut	omitted Requirements
	Form Name	Project Title	Туре	ID	Due	Updated	My Role	Action
	SMP Test	Testing	6-Month Progress Report	64640	12/8/2017	12/1/2017	Owner	🚔 🐨 🖵
- 1								



All technical questions in regard to navigating PBF's online forms and account portal are detailed in this guide.

NEW REQUIREMENTS & IN PROGRESS REQUIREMENTS

Transferring a requirement: Click on the people icon to transfer a requirement. A prompted email will appear to send to the person who will be taking over the application.

Change E-mail/Password 00				Cor	ntact the Foundation	PBF Website I	Exit/Log-O
irements, select "Submitted Requ	uirements" from the show dr o	r op-down menu on	n the right side of t	the page.			
					Hide Vi	iewer Only Require	ements
				Updated	My Role		
	Tille Type	Tille Type	Title Type ID	Tille Type ID Due		Title Type ID Due Updated My Role	Title Type ID Due Updated My Role Action

*Your Name	
Your E-mail	samantha.plotino@provident.bank
*E-mail	Check Email
*Subject	Requirement Ownership Transfer
Aemo to New Owner	Dear Grantee, This message is to notify you that ownership of Requirement 64640 has been transferred to you. You must accept transfer of ownership in order to complete this process. Please login to complete the Requirement. You can login to your account, «Account_Login_URL» at any time. NOTE: If you are a new user, a separate email will be sent to you with the login web page and your initial password. For security reasons you will be asked to change the password when you first log in.
	Maximum (5000) characters * Required



All technical questions in regard to navigating PBF's online forms and account portal are detailed in this guide.

Sharing a requirement: Click on the envelope icon to send a copy of the requirement. A prompted email will appear to send to the person who will be reviewing the application.

ccount: samantha.plotino@ ist Log in: 12/28/2017 11:3		ie E-mail/Password				Contact the Foundatio	n PBF Website Exit/Log-O
Requirements	rements ed or draft requirements,	select "Submitted Requirements" from the sh	ow drop-down men	u on the right side	e of the page.		
							ew Requirements
Form Name	Project Title	Туре	ID	Due	Updated	My Role	Action
SMP Test	Testing	6-Month Progress Report	64640	12/8/2017	12/1/2017	Owner	🔐 🛷 📼

*Your Name		
*Your E-mail	samantha.plotino@provident.bank	
*Recipient E-mail(s)		
	To send to multiple e-mail recipients, separate e-mail addresses with commas. A maximum of 10 recipients is allowed.	
*Subject	Copy of Requirement	
Message		
Send me a copy	Maximum (5000) characters *Required	
Send me a copy	Submit Cancel	



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SUBMITTED REQUIREMENTS

Once you submit your requirement you are able to review it in your Account Portal. However, once submitted, no changes can be made to the requirement. Submitted requirements cannot be deleted.

After submitting your requirement, you will receive two (2) confirmation emails: one sent <u>immediately after</u> <u>submission</u> from the system containing your complete requirement, and the second directly from PBF. Allow five (5) business days for confirmation from PBF. If you do not receive confirmation emails within the stated timeframes, return to your Account Information Portal (as described on page 3) to ensure your requirement was submitted.

To see your submitted applications, select Submitted Requirements in the "Show" drop-down menu.



Transferring a submitted requirement to a new owner: Click on the transfer icon, as described on page 16. This will bring you to a prompted email to send to the person who will be taking over the requirement.

Sharing a submitted requirement: Click on the envelope icon to send a copy of the requirement, as described on page 17. A prompted email will appear to send to the person who will be viewing the requirement.