

## A clear guide to getting started on the new portal

Our online grants portal gives you more control over your applications, helps you track progress, and saves your organisation's details so you don't have to re-enter them each time.

### 1. Signing up and getting started

Everyone using the portal for the first time needs to sign up, even if you've applied to us before.

#### To sign up:

1. Go to the portal and select **Sign Up**.
2. When asked who you're applying on behalf of, choose **an organisation or group**.
3. You'll then be asked whether you've ever applied to Two Ridings Community Foundation before, with the answer **yes** or **no**.
  - Your organisation has applied before, but you haven't? Contact us first via [email](#) or by phoning [01904 929500](tel:01904929500) so we can link you to your organisation before you register on the portal.
4. Create your personal profile (Titles are optional, but helpful)
5. If you are prompted to do so, select **Create New Record**.
6. Please enter your organisation's name.
  - Please use the same name format each time you apply (e.g., "CIC" vs "c.i.c") to avoid duplicate records.
7. Add organisation information, such as address and contact number.
8. Once completed, you will receive a verification email welcoming you to the portal. Click the link to confirm your account, and it is after this you will create your password.
9. Log in using your username and password. Once logged in, you're ready to use the portal.

### 2. Portal features

When you log in, you'll see three main sections:

- **Funding Programmes** – all open programmes (some may not be suitable for your group, so check the guidance).
- **My Applications** – all your draft, submitted, and active applications.
- **My Reporting Forms** – your open and completed end-of-grant reports.

From here, you can:

- Check the progress of your applications at any time
- Save and return to your application (some sections must be completed in one go)
- Submit reports
- Update your organisation's documents when needed

### 3. How to apply

- From the portal homepage, select **Funding Programmes**.
  - Choose the programme you want to apply for. (Read the programme information carefully to make sure you're eligible.)
- Click **Apply Here**.
- Work through the application form.
  - Some sections must be completed in one go.
  - Others can be saved and returned to later.
- Review the overview page to see all the questions and required information.
- Upload your required documents:
  - Governing document
  - Annual accounts
  - Safeguarding policy
  - Trustee/Director/Management names and addresses. (This is called **Names and Addresses** in the document section)

Your supporting documents only need updating annually or every two years, depending on the document.

- When everything is complete, you'll see a **Submit Application** button. If you don't see it, something is still missing.
- After clicking submit, you'll see a declaration page, confirm and submit again. You'll then receive confirmation.

**Tip:** If you've already started an application, clicking 'Apply Here' will take you back into your draft.

### 4. Resuming or viewing an application

To return to a draft or view a submitted application:

- Log in to the portal.
- Select My Applications.



- Choose the relevant funding programme.
- Click Apply Here to re-enter your application.
  - You can continue working on a draft or view a submitted form.

## 5. Accessing your reporting forms

To complete an end-of-grant report:

- Log in to the portal.
- Select **My Reporting Forms**.
- Choose the report you need to complete.
- Work through the form and upload any supporting documents (e.g., photos, annual reports). You can save your reporting form and return to it later.
- Submit when finished.

### Need help?

We're here to help. Get in touch if you need support.

**Email:** [grants@tworidingscf.org.uk](mailto:grants@tworidingscf.org.uk)

**Phone:** [01904 929500](tel:01904929500)

We look forward to receiving your application.