

# Welcome to the Online Grant Application System!

#### Creating an Account:

- 1. Access the new system by going to: https://ut-archivesandrecords.force.com/portal
- 2. Select "New User" to set up an account

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3. Create an account using your name, email address, phone number, and institution. Your username will be your email address. Your account details will be saved for future applications. Your password must include letters, numbers, and at least one of these special characters: !@#\$%^&\*()\_+-={}[]\|;:',.?/`~><"</p>

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4. A confirmation email will be sent to the address you registered with once your account has been created. You will be able to immediately log in and start working on your application!

#### Getting Started:

1. Login at <u>https://ut-archivesandrecords.force.com/portal</u> with your username (email address) and password.

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2. Select "Apply." You will be taken to a page listing available funding opportunities.

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- 3. The only available grant opportunity will be "Grant Application 2022." Click the "Apply" button under "Actions" to the right of the screen.
- 4. The next page will contain two buttons, one that says "View Other Funding Opportunities," and one that says "Apply Now." Select "Apply Now."

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5. Your application has been created. Select "Start Application" to begin answering questions.

Success: Grant Application created.	out
Grant Application 2022	
Click the button below to edit your application and submit it for review. Start Application	
© 2022 Utah Division of Archives and Records USHRAB   Privacy Policy Powered by Service community grants -	

# Filling Out Your Application:

- Once you have clicked "Start Application," you will be taken to the body of the application. The first section, "Overview," asks for the amount of grant funding you are requesting from the USHRAB and for a title for your proposed project. These fields are required for you to move onto the next section. Please read through the application and program information in this section before moving onto the application questions.
- 2. Beginning with section 2, "General Application Information," you may notice that some questions already contain answers. This information is pulled from your user account.

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Some fields have character limits. You will see the red bars as you approach those limits.

3. As you work through each section, "Save" often! Select "Next" to move to the next section. If you need to exit and return to the application later, click "Save and Exit."

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# Editing an Existing Application:

1. Login at <u>https://ut-archivesandrecords.force.com/portal</u> with your username (email address) and password.

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2. Click "Update" and you'll be taken to a screen with your in-progress application. Click the green pen option under "Actions" to edit.

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3. Don't forget to "Save" often as you work!

## Uploading Accompanying Documentation

- 1. Two sections require you to upload documents supporting your application: the Project Scope and the Budget.
- 2. We have created a template for your Project Timeline. You can access it with the link at the top of Section 5, "Plan of Work."

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Grant work may not begin before contracting the services of an outside organization providing the services.	July 15, 2022 and must I organization require a lette See the above link for a tem	be completed by June of agreement betwee plate.	e <b>26, 2023.</b> Digi en your organizat	itization projec ion and the	ts
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If you are contracting digitization services, you MUST upload an additional document, the Letter of Digitization Agreement signed by both you and your partner institution. Find the template at the top of Section 5, Plan of Work.

3. When you click these links, the documents will open in your browser. Click "Download" to save the template to your computer, then open and work with it there.

igitization Agreement 2022	2/23/2022	🛃 Download	
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		Page 1 of 1	

4. When you are ready to upload them, click "Choose File" and select your file. Then click "Upload." When your file has successfully uploaded, you will see the file name, the timestamp, and an option to delete if necessary.

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		8. Review & Status
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5. The template for the budget has been provided at the top of Section 7, "Budget." Just like the Project Timeline template, the budget template will open in your browser. Click "Download" to save to your computer.





6. When your budget is ready, click "Choose File" to attach, then "Upload."

HISTORICAL #Portal Home Funding Opportunities My Applications Panel Review © (# Logout	
<ul> <li>ADVISORY BOARD</li> <li>7. Budget</li> </ul>	
▲ Save & Exit 😫 Save 《 Previous Next » 🎓 Submit Funding Application 🔝  = Required Information	
Budget Please download the Budget Template here	
The Grant Request is the amount of funding requested from the USHAB. Be as dealled as possible when filling out this budget. The amount requested must be matched by the organization with a least a 1:1 ratio by a cash match, in-kind match, or a combination of the two. Insert additional rows and/or provide attachments if needed. The Kash Match is the amount of movies the register. Joint of the source of the two sections and the register is the source of the two sections. Source of the two sections are available to the register is the source of the two sections. Source of the register is the register. The Net Match is the amount of movies the register is the source of the register is the source of the register is the regi	
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+ 8. Review & Status	

## Submitting Your Application:

- 1. Double and triple check your application!
  - a. Is each section complete?
  - b. Have you attached all the required documentation?
  - c. Have you checked for spelling/grammar errors, typos, and inaccuracies?
  - d. Is your contact information complete and accurate?
  - e. Is your budget totaled correctly? Have you accounted for your institution's match of at least 1:1?
  - f. Have you had someone proofread your application for clarity of content and presentation?
- Section 8, Review and Status will show you whether you have completed all required sections of the application. If there is nothing missing, you will see all green checks (complete) or black circles (incomplete but not required). If something is missing, you will see a red X.

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	* 8. Review & Status
	Save & Exit 🛱 Save < Previous 🦽 Submit Funding Application 👔
	Please review your Funding Application for "Grant Application 2021" and be sure you answer all the required questions. Use the next and previous buttons to navigate through the sections. The questions and your responses are summarized below using the following status icons:
	Question has been answered.
	• Question has not been answered and is required.
	Question has not been answered but is optional.
	General Application Information
	Records Information
	<ul> <li>Describe the records that will be the focus of this project.</li> <li>What is the volume of records (cubic or linear feet; number of boxes/folders; etc.)?</li> <li>What is the date range of the records (dates of creation)?</li> <li>What is the did information do the records contain?</li> </ul>

In the screenshot above, all required sections have been answered.

3. If a required section is missing, you will not be able to submit your application until you fix it.



In this screenshot, you can see that my budget is missing. There is a red X and the option to "Submit Funding Application" is unavailable. I'll need to return to the budget section and upload my budget documentation before I can submit.

4. If you're ready to submit and nothing is missing, you will see the option to "Submit Funding Application."



5. Once you submit, you can't edit your application anymore, so make sure you're ready!!

- 6. When your application has been successfully submitted, you'll receive a confirmation email. If you don't see it in your inbox, check your Spam folder.
- Celebrate! You're done! The Board will be evaluating applications starting May 10 and meeting in mid-late May to make their final funding decisions. You'll be notified within 30 days of the submission deadline.