



The **COMMUNITY** Foundation *for* Greater New Haven

REVIEWER GUIDE ANIMAL SHELTER AND SMALL GRANT APPLICATIONS

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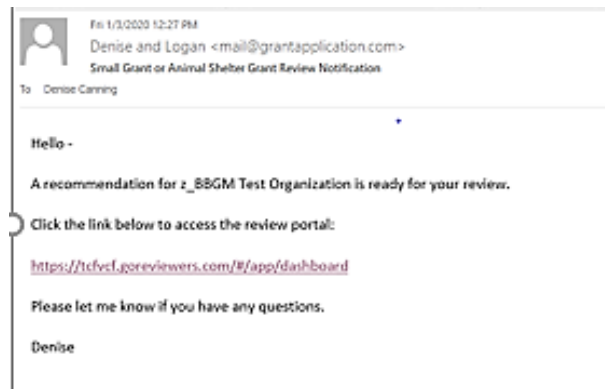
Introduction

The Blackbaud Grantmaking Reviewer Portal gives you the ability to review pending grant proposals online.

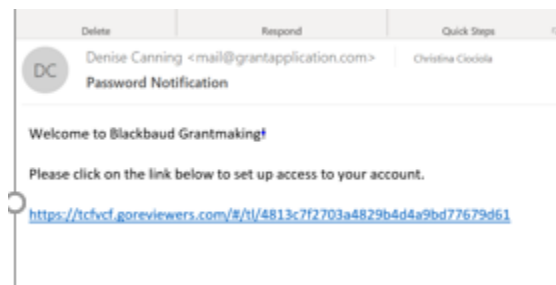
As a Reviewer, you will be able to log in with a personalized account to review an Animal Shelter and Small Grant request and recommendation for funding. You can then submit your approval or denial of the recommendation instantly online. You can also submit questions about the proposal through the Reviewer Portal.

Log in

As applications for review become available, you will receive an email notification that will include a link directing you to the reviewer portal where you will need to enter your current username and password to access the applications.



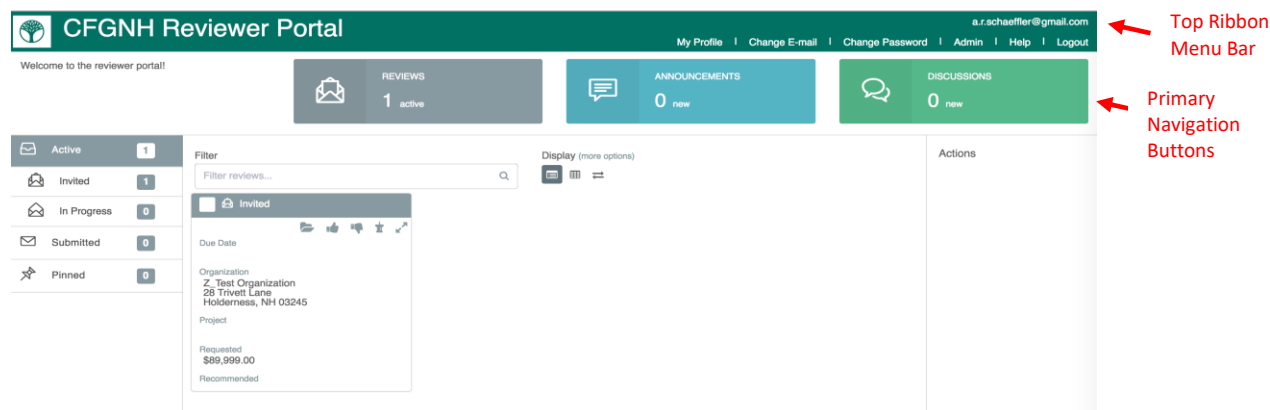
If you are a new grant reviewer, you will receive an email notification that will include a link directing you to create a log-in account. You will be instructed to set up a password and create answers to two security questions.



If you request a new password and don't receive one through the automated system, please check to make sure the email did not go to your junk mail. You may need to manually authorize the website (tcfvcf.goreviewers.com) as a safe site in your email settings.

You can also access the Reviewers Portal at anytime though: <https://tcfvcf.goreviewers.com/>

Dashboard



Top Ribbon Menu Bar

The top ribbon menu bar allows you to change your E-mail, change your password and logout. To return to the main dashboard, select the logo in the upper left hand corner on any page.

Primary Navigation Buttons

The primary navigation buttons are at the top of the page. **Reviews** (grey box) displays your active reviews and **Announcements** (blue box) displays information from the Foundation. **Discussions** allows you to see comments left by other reviewers.

Left-hand Column

The Left-Hand Column displays information about your reviews. Use these buttons to move from your **Active**, **Invited**, **In Progress**, **Submitted**, and **Pinned** reviews.

Active	1
Invited	1
In Progress	0
Submitted	0
Pinned	0

- **Active** – Combined total of Invited and In Progress queue
 - **Invited** – To be acknowledged as accepted or denied
 - **In Progress** – Currently being worked on
- **Submitted** – Completed reviews
- **Pinned** - Pinning allows you to have quick access to specific reviews

Center Column

Filter, View, Sort and Display Options

The options to Filter and Sort have drop-down menus to choose the information that is displayed on the page. The View option may allow some customization based on the grant makers preference.

- **Filter** – Keyword search through displayed records
- **View** – Pre-defined sets of fields displayed in the review records
- **Sort** – Pre-defined sortable values from the views
- **Ascending/Descending** - Sortable views

Step 1 - Reviewing a grant proposal

View Request and Complete Review

Click the Folder icon on the left of the in progress proposal to open the Review.

The screenshot displays the CFGNH Reviewer Portal interface. At the top, there is a green header bar with the portal name and user navigation links. The main content area is divided into a left sidebar, a central form, and a right sidebar. The left sidebar contains a 'Go to' menu with options like 'Feedback', 'Request Write-Up', 'Related', 'Discussions', and 'Documents'. The central form is titled 'Review - z_BBGM Test Organization' and includes a 'Feedback' section with a question about funding approval and a 'Request Write-Up' section with fields for Staff, Type, Request Date, Board Date, and Amount Requested. The right sidebar contains an 'Actions' menu with options like 'View Request', 'Submit', 'Send to PDF', and 'E-mail Denise Carving'. At the bottom of the form, there are buttons for 'Save & Close', 'Save', and 'Cancel'.

On the left side of the screen, you will see the following:

Go To Menu:

This allows you to quickly jump to different sections within the review. The options here will vary depending on the grant program that you are reviewing.

Related Menu:

Discussions: Access the Discussions that may be occurring among other reviewers of this application.

Documents: You may access the related documents that are included as part of this proposal (such as the application, budget, etc) by clicking “Documents”.

On the right side of the screen you will see an **Actions Menu** with the following options:

- View Request: Click to view the application sent by the applicant.
- Submit: Click to Submit your review once it is complete
- Send to PDF: This allows you to send your review and it's attachments to a PDF file for your own records.
- **Email (Staff Member): This allows you to email the staff member that has assigned this review to you any questions pertaining to the proposal. All questions must be asked before submitting your recommendation (step 2 below).**

Options at the bottom of the review screen:

- Save & Close – Save your changes and return to the home page
- Save – Saves changes but keeps the record open
- Cancel – Discards unsaved changes and returns to the home page

Step 2 - Submitting Your Recommendation

When you are ready, **answer yes or no to the first question: Do you approve funding for this grant?** (undecided is not a valid choice). Then submit your recommendation.

There are two ways to submit your recommendation:

1. **Recommended Method:** While the grant record is open, click on the **Save** button at the bottom of the page. Then click on the **Submit** link in right column. The system will ask you to confirm that you are ready to submit the review. Click **Yes** to confirm the submission.

The screenshot displays the CFGNH Reviewer Portal interface. At the top, there is a green header with the portal name and user navigation links. The main content area is titled 'Review - z_BBGM Test Organization' and includes a 'Feedback' section with a question about approving funding. To the right, an 'Actions' menu is visible, with the 'Submit' option highlighted by a red circle. Below the feedback section, there is a 'Request Write-Up' section with fields for staff, type, request date, board date, and amount requested. At the bottom, there are buttons for 'Save & Close', 'Save', and 'Cancel'.

CFGNH Reviewer Portal

My Profile | Change E-mail | Change Password | Admin | Help | Logout

Review - z_BBGM Test Organization
In Review as of 1/3/2020

Go to
Feedback
Request Write-Up

Related
Discussions
Documents

Feedback

To view the Application and associated documents, click the DOCUMENTS link on the left panel.

Do you approve funding for this grant?
☒ Yes ☐ No ☐ Undecided

Request Write-Up

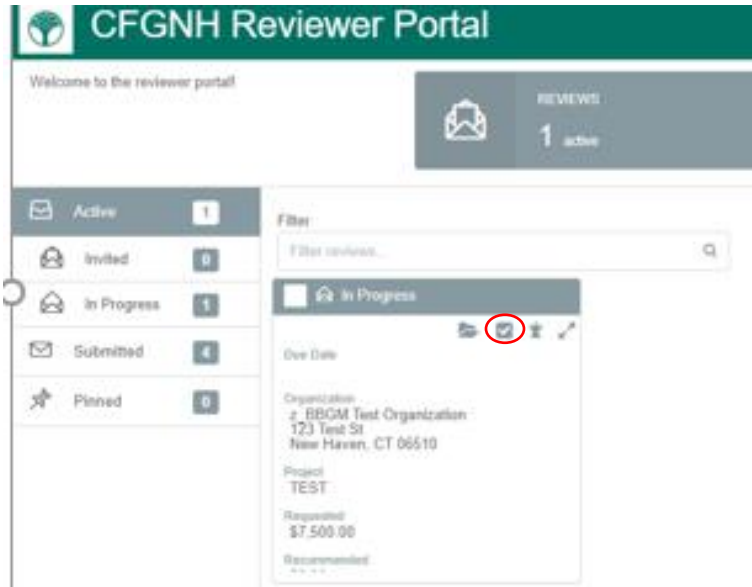
Staff: DCANNING Type: Year Round Small Grants

Request Date: 12/26/2019 Board Date: 1/22/2020 Amount Requested: \$7,500.00

Save & Close Save Cancel

Actions
★ View Request
✔ Submit
📄 Send to PDF
✉ E-mail Denise Carrington

2. Click **Save & Close** button at the bottom of the page to return to the main dashboard. You may then click on the **checkbox (Quick Submit)** at the top of the application record from the Card or Table view. **The system will submit the review without opening the review record for verification.**



Viewing Documents after Submitting

To view an application after you have submitted your recommendation, click on the **Submitted** folder in the left column of your dashboard.

You may not make changes or updates to submitted reviews.

Please feel free to contact Denise Canning at dcanning@cfgnh.org with any questions or issues.

DISCLAIMER: ALL grant and scholarship information on this portal is considered confidential. Please do not share this information with anyone outside the Foundation. If you download materials from this portal to your personal computer, please make sure to delete such files after grant and scholarship decisions have been made.