Max e-Grants Applicant Grantmaking Help Guide

Max e-Grants is managed via Blackbaud's Grantmaking software. This guide will help you to navigate the software to be able to successfully complete applications, grant agreements and grant acquittals.

Please note: In January 2019, we changed the software used to manage the grants process. As a result previous applications from 2018 or earlier are no longer available online.

Please check our FAQ's and Terms and Conditions found on **maxegrants.co.nz** for any queries about the Max e-Grants programme itself. The information below is designed to assist you in the application process via Grantmaking.

NB: There will be two areas of the site that you need to be familiar with - the **Applications** page and the **Requirements** page. You will gain access to the **Requirements** page if your grant application is successful.

Logging into your account

All applicants are first directed to the **Max e-Grants Account login** page prior to accessing an application form.

New applicants

You can register a new account by clicking the '**New Applicant?**' link found below the email address field.

The system will then prompt you to create a password.

Please make note of your login ID (email address) and password so that you can login and access any saved applications or requirements in the future.

Make sure you enter your school email address to be associated with your account. All email correspondence will be sent to this address.

NB: If you complete the New Applicant section and receive the error 'Invalid e-mail or password', the email address you are using already has an account. Click the **Forgot Password?** link below the password field to reset the password.

Returning applicants

Enter your login ID (email address) and password to begin the application process. If you have forgotten your password, click on the **Forgot Password?** link and an automated email will be sent to your email address with a temporary password. If you do not receive this email response, please refer to the troubleshooting tips within this document.

Applications Page

When you log in you will be automatically directed to the **Applications** page. Use the drop-down menu on the right of the page to select between 'In Progress' or 'Submitted' applications.

New Applications

Start a new application by selecting the new application link at the top of the **Applications** page.

In Progress Applications

Show [In Progress Applications ▼]

Access any saved applications on the 'Applications**'** page, use the dropdown menu to switch from **Submitted** to **In-Progress** and click on the application name to continue working on an application you've already started.

Use the 'Action menu' (far right column) to:

> **Action**
>
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1. Delete a duplicate or unsubmitted application
2. Email a copy of an application to someone else to review

Submitted Applications

Show [Submitted Applications ▼]

To view submitted applications, use the dropdown menu to switch from **In-Progress** to **Submitted**.

Submitted applications are read only. If you need to make a change, please contact us at **maxegrants@barnardos.org.nz**

Requirements Page

All grants require the signing and submission of one or more **requirements** forms before any payment is released or the grant can be finalised. These forms include the grant agreement form and the acquittal form. Grant conditions forms must be read, and signed by your school principal who is legally authorized to execute a contract on behalf of the organisation.

If your application is approved you will be notified when the grant agreement and acquittal forms become available to you through your account.

To access these forms, login to your account using the same email and password that was used to submit your application.

1. Once logged in, click the **Requirements** tab at the top of the page.
2. Use the drop-down menu on the right to select between **New**, **In Progress**, or **Submitted**.

New Requirements

Any new requirement forms are listed as a link.

1. Click the form name to open the form.

Note: Once you open the form – whether or not you make changes – it is moved to the **In Progress** requirements list. If you logout and return later, the form is listed under **In Progress**.

2. If the form needs to be reviewed by a principal or someone else before it can be signed and submitted, click the Email icon in the Action column on the far right.

3. Read through the form, complete the fields, and click Finish & Review.
4. Review the fields, then click Submit when you are ready.

In Progress Requirements

Any requirement forms you have opened and worked on but have not yet submitted are listed under the **Requirements** tab in the dropdown as '**In Progress'**.

Click the form name to open and continue working on it.

Submitted Requirements

After you've reviewed and submitted your report or requirement the following will happen,

- A confirmation in orange letters is displayed at the top of the page.
- The form is moved to the **Submitted** Requirements section of the dropdown menu.
- A confirmation email is sent to you.

Note: If you believe you have submitted a form, but have not received a confirmation email, check in the **In Progress** section to make sure it was submitted.

Transferring Login Accounts

If an individual with access to an application's history has left your school and a new employee needs access to that information, contact us at **maxegrants@barnardos.org.nz** and we can transfer your organisation's application history to a new account.

If multiple people from your school need to access this information, we recommend you create a general email address with a correlating login to our system so that multiple people can access the information.

Troubleshooting Tips

- Limit your use of bullets and other formatting in the **Text** fields of your application and requirement forms.

- Your email account (user ID) must allow for automated emails so you can receive correspondence from our online grant system. If you are not able to receive automated emails from our system, your email account is identifying our automated emails as spam.

- Add the email addresses below to your address book and also notify your information technology (IT) department (or the department that controls system proxy settings) and have them allow for emails from these addresses as well.

mail.grantapplication.com
mail.grantrequest.com
maxegrants@barnardos.org.nz

Frequently Asked Questions

I have forgotten my password. How do I reset it?

Click the **Forgot Password?** link available on the account login page.

Why am I not receiving any emails after clicking on 'Forgot Password?' or after submitting applications?

If you do not receive this email please be sure to check your Spam or Junk email folder in your Inbox or ask your email administrator about SPAM filter settings. Any emails from **mail@grantapplication.com** must not be blocked.

How do I access a saved application so that I can complete and submit it?

Login to your account at **www.grantrequest.com/SID_6023**

Can I spellcheck the narrative I include on my application?

Yes. Use the red checkmark icon on the right of any section where it is available to spell check your narrative.

Can I copy and paste into an application that I have started?

Yes. However, the word count feature is not entirely accurate when you do this. It is recommended to enter your text answers directly into the application.

How do I know my application was received?

After you submit the application, an email notification is sent stating that the application was received. If you do not receive this email please be sure to check your Spam or Junk email folder in your Inbox or ask your email administrator about SPAM filter settings. Any emails from mail@grantapplication.com must not be blocked.

How do I notify you if my contact information changes after I submit my online application?

Please contact us directly at: **maxegrants@barnardos.org.nz**

How do I access an online Requirement?

Login to your account at **www.grantrequest.com/SID_6023**. Then, click the **Requirements** tab.

Use the dropdown menu to select **New Requirements**.

Why do I not see my Requirements on my account page?

When you first login to your Account page, the **Applications** tab is selected. To view any new Requirements, click the **Requirements** tab and select **New Requirements, In Progress**, or **Submitted** from the dropdown menu.

I received the following error message when I tried to set up a new account: Invalid e-mail or password.

If you have attempted to login with the wrong password several times, the account is disabled. To reset the password and re-enable the account, click on the **Forgot Password?** link. An automated email is sent to your email address with a reset link.