



Applicant Guide

Use this guide if you start, write, submit, manage, or report on a grant project.

BEFORE YOU BEGIN

Have your invitation email, your club information, project dates, budget details, and supporting files ready.

HOW TO USE THIS GUIDE

Complete the tasks in order. Each task tells you where to begin, what to select, how to know you are finished, and what happens next.

Understand the two timelines

A Grant Cycle can close while its awarded projects and reports continue.

Grant Cycle	One application opportunity, including its application dates, review, and award decisions.
Project Period	The dates when an awarded project is expected to begin and end. It may continue after the Grant Cycle closes.
Reporting Schedule	The progress and final reports required for an awarded project, with their due dates.
Project closeout	The final checks that formally complete an awarded project after its required reports are accepted.

Tasks at a glance

1. Sign in 2. Open the public application page 3. Use Your Projects as the home page 4. Start the project 5. Describe the project 6. Explain the community need 7. Build a balanced budget 8. Upload documents	9. Set outcomes and measures 10. Review and submit 11. Respond to preliminary review 12. Accept the award and confirm receipt 13. Maintain project finances 14. Request a project change 15. Complete and review the final report 16. Return to a completed project
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Screenshots use fictional training records. Names, dates, amounts, and district numbers will differ.

Sign in

WHERE TO BEGIN	Start on the GrantsPost sign-in page.
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WHERE TO BEGIN	Start on the GrantsPost sign-in page.
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- 1 Enter the email address from your invitation.
- 2 Enter your password.
- 3 Select Sign in. If you cannot remember your password, select Forgot password?

Sign In

Use the email and password from your workspace invitation.

Email

Password

→

Sign in

Forgot password?

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

You arrive at the home page for your assigned role.

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WHAT HAPPENS NEXT

GrantsPost opens the home page for your assigned role.

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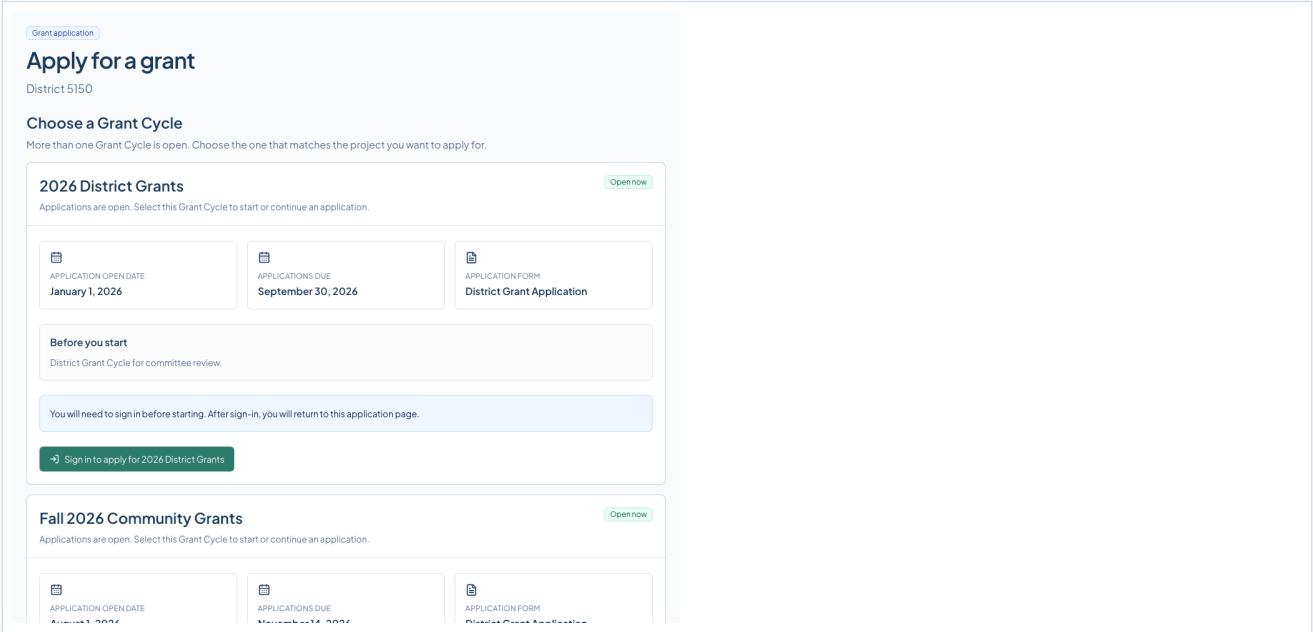
IF SOMETHING IS NOT WORKING	Check that you used the email address from the invitation. Use Forgot password? before asking an administrator to resend access.
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Open the public application page

WHERE TO BEGIN Open the application link sent by your district.

- 1 Review every open Grant Cycle. Choose the one that matches the project you want to apply for.
- 2 Confirm its deadline and eligibility information. Select Sign in to apply for [Grant Cycle name]. If you are already signed in, select Apply for [Grant Cycle name].
- 3 Choose your club. Request an unlisted club only if it is not already available.



Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

You are signed in and associated with the correct applicant organization.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

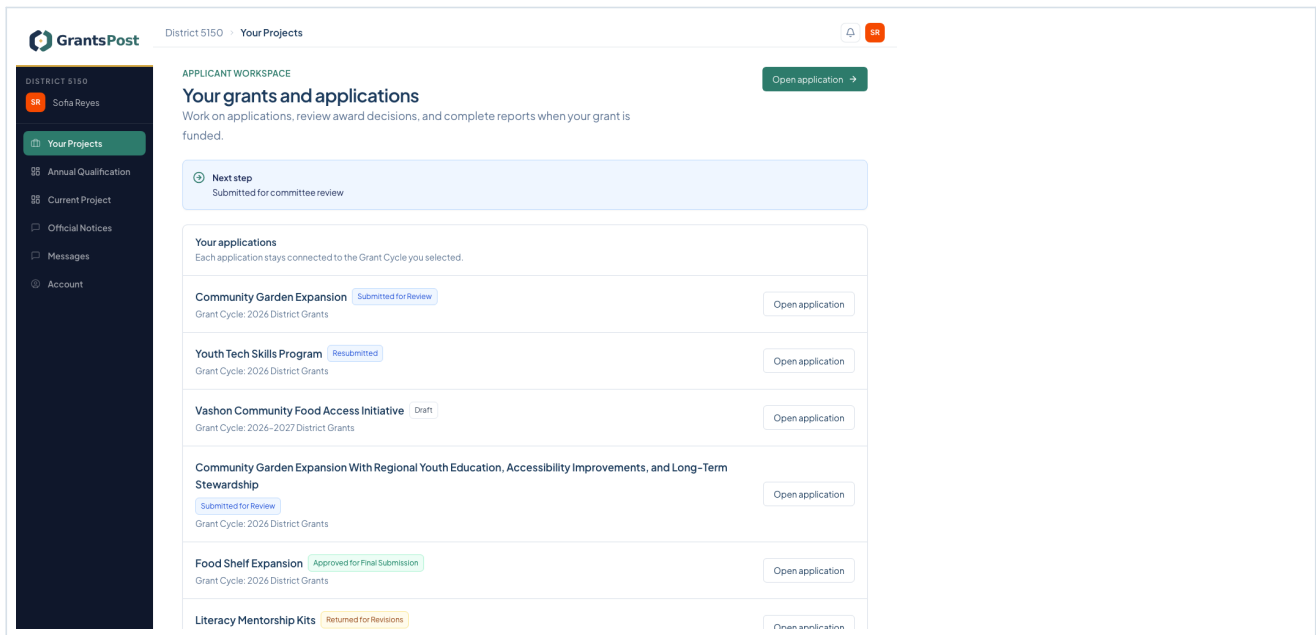
Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Use Your Projects as the home page

WHERE TO BEGIN

After signing in, open Your Projects.

- 1 Read the Next step message near the top of the page.
- 2 Open the project or report named in that message.
- 3 Use the status on each project card to tell whether you need to act or wait.



Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

You know exactly which project or report to open next.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Start the project

WHERE TO BEGIN

From Your Projects, open the project that needs attention.

- 1 Enter the project title, applicant contact, and other starting information.
- 2 Save the starting information.
- 3 Follow the project menu from top to bottom. Save each section before moving on.

The screenshot shows the GrantsPost interface for a user named Sofia Reyes. The main heading is 'Community Garden Expansion' with a subtext 'Continue building your District Grant application.' and a deadline 'APPLICATIONS DUE Feb 14, 2026'. The page is divided into several sections: 'COMPLETION' (0% complete), 'DOCUMENTS' (6/7 ready), 'REQUESTED' (Not set), 'Project Health' (GREAT PROGRESS, 0% complete), 'Core Application Information' (Review comments and suggested edits from the committee), 'Reviewer Feedback' (1 comments and 0 suggested edits are available), and 'Project Sections' (0% complete). The 'Project Sections' list includes 'Core Application Information' (50% complete), 'Project Overview' (0% complete), and 'Community Need' (100% complete).

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The project has a clear title and the first application section is available.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

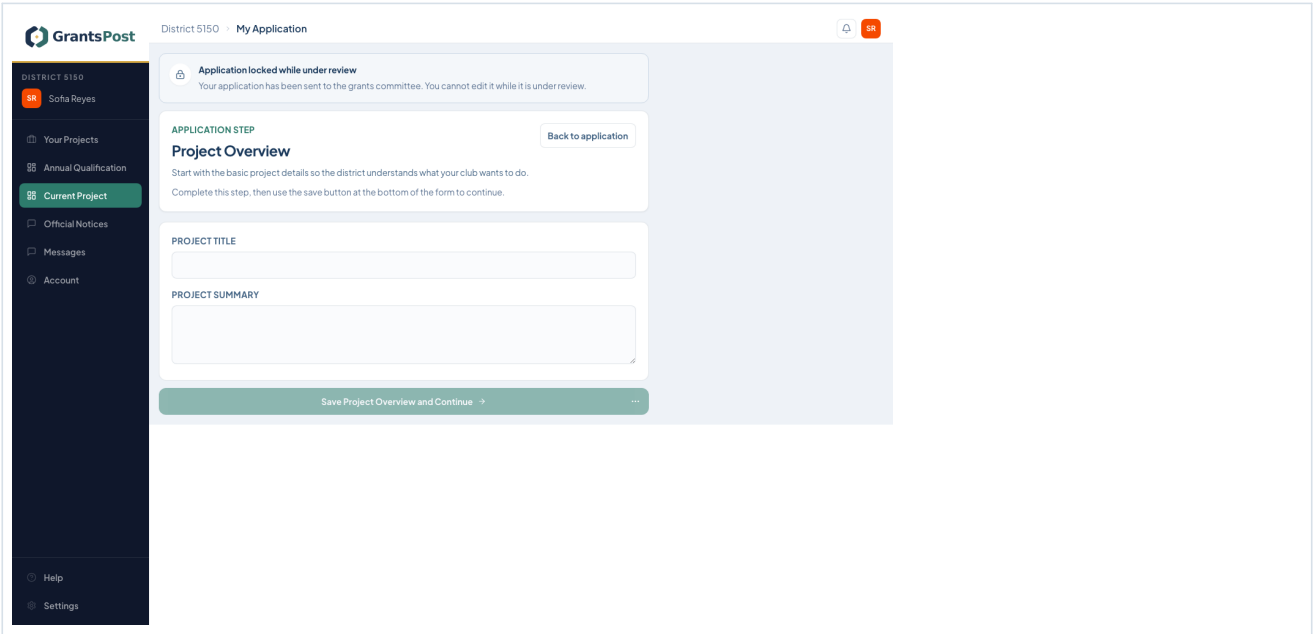
IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Describe the project

WHERE TO BEGIN In your project, open Project Overview.

- 1 Enter the project title, location, Project Period, project type, and amount requested. The Project Period may continue after the Grant Cycle closes.
- 2 Check that these details match the budget and supporting documents.
- 3 Select Save Project Overview and Continue.



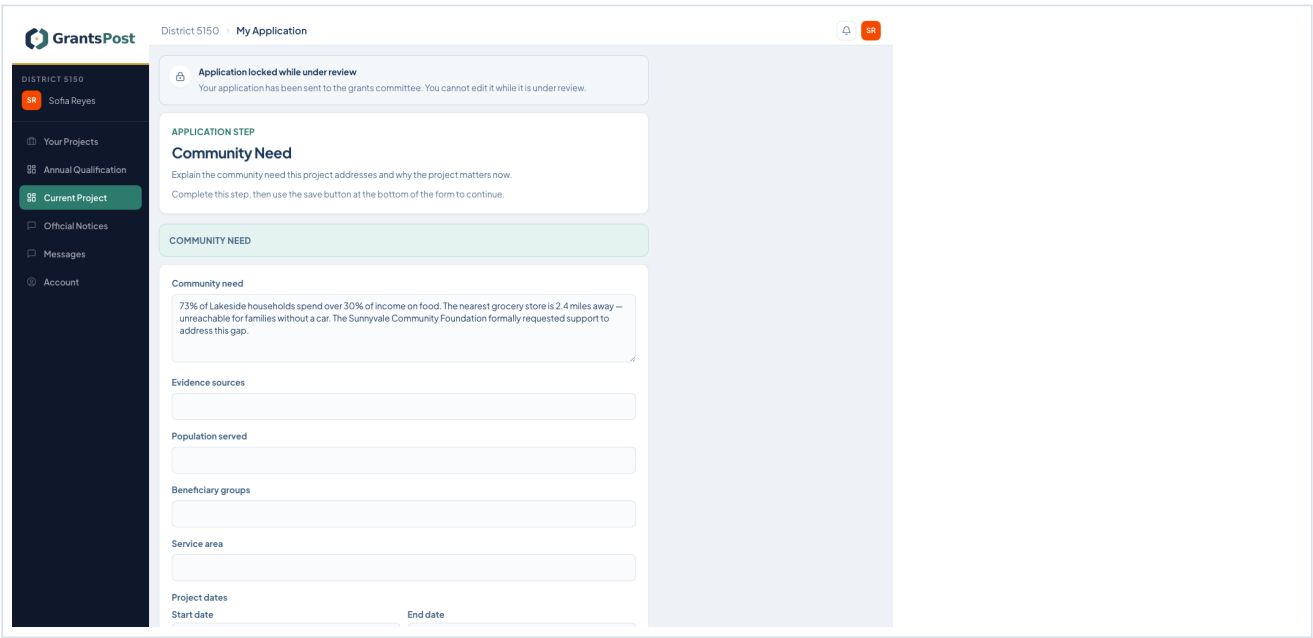
Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN Every required overview field is complete and saved.	WHAT HAPPENS NEXT Return to your role's home page and follow the next action shown by GrantsPost.
IF SOMETHING IS NOT WORKING	Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Explain the community need

WHERE TO BEGIN In your project, open Community Need.

- 1 Describe the need, who is affected, and the evidence that supports the need.
- 2 Explain the planned activities, expected benefit, and how the work will continue.
- 3 Select Save Community Need and Continue.



Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

A reviewer can understand why the project matters and how it will help.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

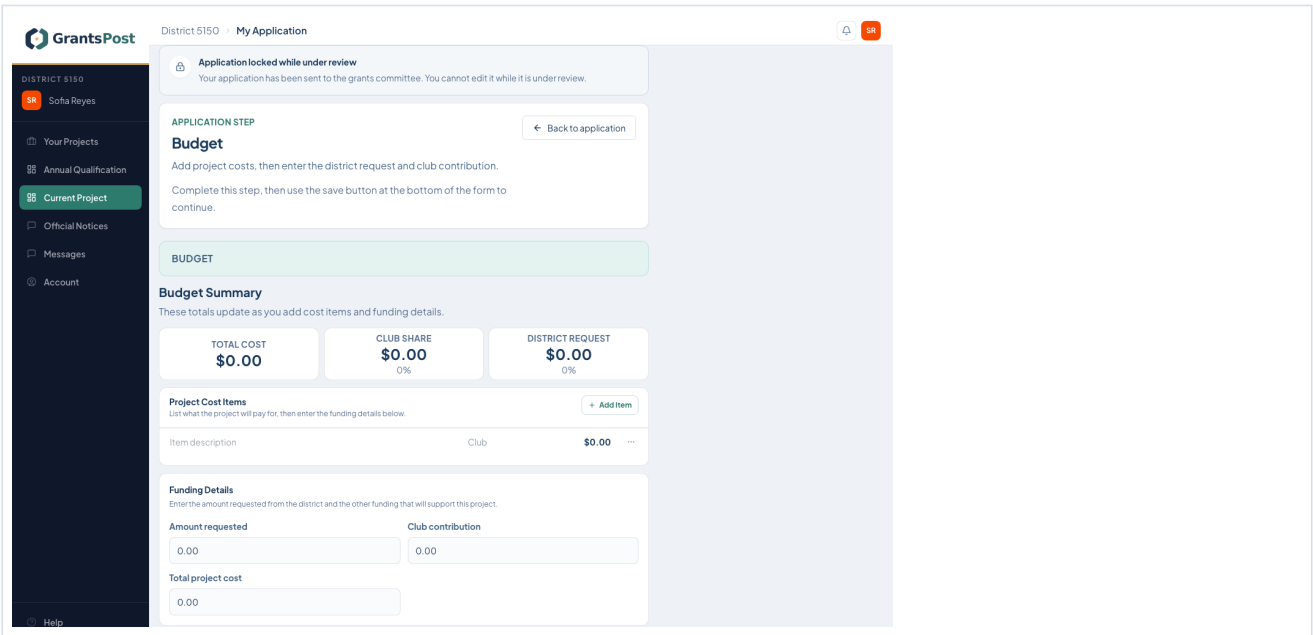
IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Build a balanced budget

WHERE TO BEGIN In your project, open Budget.

- 1 Add every project expense and funding source.
- 2 Check that total funding equals total expenses and that the grant request is within the limit shown.
- 3 Select Save Budget and Continue.



Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The budget balances and stays within the configured request limit.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

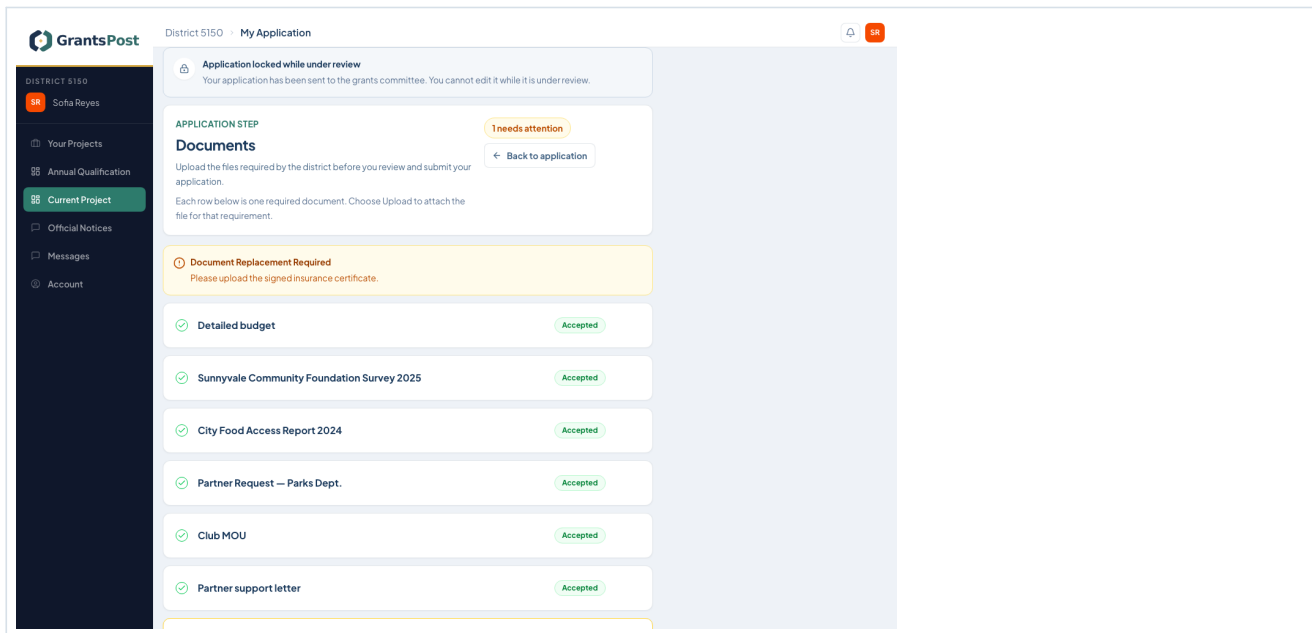
If the budget will not save, check that funding equals expenses and the request is within the displayed limit.

Upload documents

WHERE TO BEGIN

In your project, open Documents.

- 1 For each item marked Required, select Upload.
- 2 Choose the correct file and wait until its status shows that the upload finished.
- 3 If the wrong file was added, select Replace and upload the correct one.



Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

Every required document shows as ready.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

If upload fails, check the allowed file type and size shown beside the requirement.

Set outcomes and measures

WHERE TO BEGIN

In your project, open Outcomes and measures.

- 1 Choose the priority area and enter the number of people expected to benefit.
- 2 Add a measurable target and explain how you will measure it.
- 3 Save the section and confirm the target matches the project plan.

GrantsPost Rotary District 5030 QA My Application

Back to project

ROTARY DISTRICT 5030 QA
AA Avery Applicant

Your Projects
Annual Qualification
Current Project
Official Notices
Messages
Account

IMPACT PLAN

Outcomes and measures

Commit to the priority area, eligible pathway, target population, and measurable results that reviewers will assess and that future reports will compare against.

District 5030 Areas of Focus and measurable impact
Version 2026-27.1 - choose 1-7 priority area(s).

AREAS COMMITTED	TARGETS DEFINED	APPLICANT EDITING
1	1	Locked

Promoting Peace
Choose a pathway and define measurable targets. Available

Peacebuilding and conflict prevention

Eligible activity *
Choose an activity

Community need * Target population *

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The project has measurable targets that match the application narrative.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Review and submit

WHERE TO BEGIN

In your project, open Review & Submit.

- 1 Open every item marked Needs attention and correct it.
- 2 Preview the application and check names, dates, amounts, documents, and signatures.
- 3 When all checks pass, select Submit for committee review.

The screenshot shows the GrantsPost interface for District 5150. The user is logged in as Sofia Reyes. The main heading is 'APPLICATION SUBMITTED Project Submitted'. Below this, a message states: 'Community Garden Expansion has been submitted to District 5150 for review.' A table titled 'Submission details' provides the following information:

PROJECT TITLE Community Garden Expansion	CLUB Rotary Club of Sunnyvale
GRANT CYCLE 2026 District Grants	STATUS Submitted for Review
SUBMITTED Feb 1, 2026, 10:00 AM	APPLICATION REFERENCE GP-C71235C8

Below the table, a section titled 'What happens next' lists three steps:

- 1 District reviews your application
- 2 Committee evaluates and scores
- 3 District notifies you of the decision

A green button at the bottom says 'Return to Your Projects'.

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The confirmation says the application was submitted and no editing controls remain.

WHAT HAPPENS NEXT

The submitted application becomes read-only and moves to preliminary or committee review.

IF SOMETHING IS NOT WORKING

Select the first Needs attention item. GrantsPost will take you to the section that must be corrected.

Respond to preliminary review

WHERE TO BEGIN

Open Your Projects, select the project, then open the preliminary review request.

- 1 Read each question and the reviewer's instructions.
- 2 Enter a direct answer. If a file was requested, select Upload and attach only the requested file.
- 3 Submit the response shown on the page. Your application stays read-only during this step.

ACTION PATH

Open request



Answer each item

Upload requested file if
needed

Submit response

YOU ARE FINISHED WHEN

Every open question has a clear response and each requested file is attached.

WHAT HAPPENS NEXT

The primary reviewer reviews your response and may resolve it or ask a follow-up question.

**IF SOMETHING IS
NOT WORKING**

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Accept the award and confirm receipt

WHERE TO BEGIN

Open your awarded project, then Accept award and receive funds.

- 1 Read the award amount, conditions, due date, and acceptance statement.
- 2 The authorized officer completes the acceptance action shown on the page.
- 3 Select Confirm receipt only after the money has reached the club's account.

GrantsPost Rotary District 5030 QA My Application

← Back to project

AWARD ADMINISTRATION

Accept award and receive funds

Complete the configured acceptance statements, submit evidence for award conditions, and track each authorized transfer separately from money actually received.

AWARD	AMOUNT	ACCEPTANCE	ACCEPTANCE DUE
GP-2026-0001	\$5,000.00	Accepted	Sep 5, 2026

Award acceptance
Each statement preserves its exact version, signer identity, represented organization role, and award-subject hash.

Organization award acceptance

I accept this award on behalf of my organization, agree to the approved project scope and award conditions, and accept responsibility for stewardship, documentation, reporting, and returning any unused or ineligible funds.

Current president - Typed name
Signed by Jordan President on Aug 6, 2026

Award conditions
A payment authorization may require even more conditions to be satisfied or formally waived.

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The award shows accepted and the received amount is recorded.

WHAT HAPPENS NEXT

The district can track the confirmed receipt and the project can begin under the award conditions.

IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Maintain project finances

WHERE TO BEGIN

Open your awarded project, then Project finances.

- 1 Add each income or expense with its date, amount, category, payee or source, and reference.
- 2 Upload the receipt or other evidence when required.
- 3 Save the entry and complete the reconciliation steps shown by your district.

GrantsPost Rotary District 5030 QA > My Application

Back to project Compliance records

ROTARY DISTRICT 5030 QA AA Avery Applicant

POST-AWARD FINANCIAL CONTROLS

Project finances

Maintain the transaction ledger, source evidence, bank reconciliations, surplus returns, and durable-asset custody record for this award.

AWARD	BASELINE	POSTED INCOME	POSTED EXPENSE	LEDGER BALANCE
GP-2026-0001	Version 3	\$5,000.00	\$1,200.00	\$3,500.00

Record a transaction
New entries remain drafts until their allocation and required source evidence are complete. Posted entries cannot be edited.

Direction: Expense Transaction date: mm/dd/yyyy

Amount: Currency: USD

Exchange rate to account currency: Only needed for foreign currency Category: Choose a category

Payee or source Reference

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The project account agrees with the supporting records and bank statement.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Request a project change

WHERE TO BEGIN

Open your awarded project, then Project changes.

- 1 Enter a short title and explain what needs to change and why.
- 2 Add the affected scope, budget, schedule, outcome, or partner item.
- 3 Save the request, review it, then select Submit for approval. Do not make the change until it is approved when prior approval is required.

GrantsPost Rotary District 5030 QA > My Application

← Back to project

APPROVED-PROJECT GOVERNANCE

Project change requests

Request approval before implementing a change to the approved scope, budget, schedule, outcomes, or partners.

AWARD	CURRENT BASELINE	BASELINE HASH	IMPLEMENTATION RULE
GP-2026-0001	Version 3	7c3a7fc40932c4c1	Approval required

Create a change request
You may include up to three related changes in one request. Additional items can be added through the same underlying configurable model.

Request title

Why is this change needed?

Urgency

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The request has a recorded decision and the approved project plan is updated when needed.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Complete and review the final report

WHERE TO BEGIN

From Your Projects, open the report marked Action needed.

- 1 Open the awarded project and its report, even if the original Grant Cycle is already closed.
- 2 Answer every report question and compare results with the approved project plan.
- 3 Upload the required documents and complete the certification.
- 4 Review the report, then select Submit report. If it is returned, correct only the requested items and submit again.

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The final report status is Accepted.

WHAT HAPPENS NEXT

A reviewer checks the submitted report and may accept it or return it for revision.

IF SOMETHING IS NOT WORKING

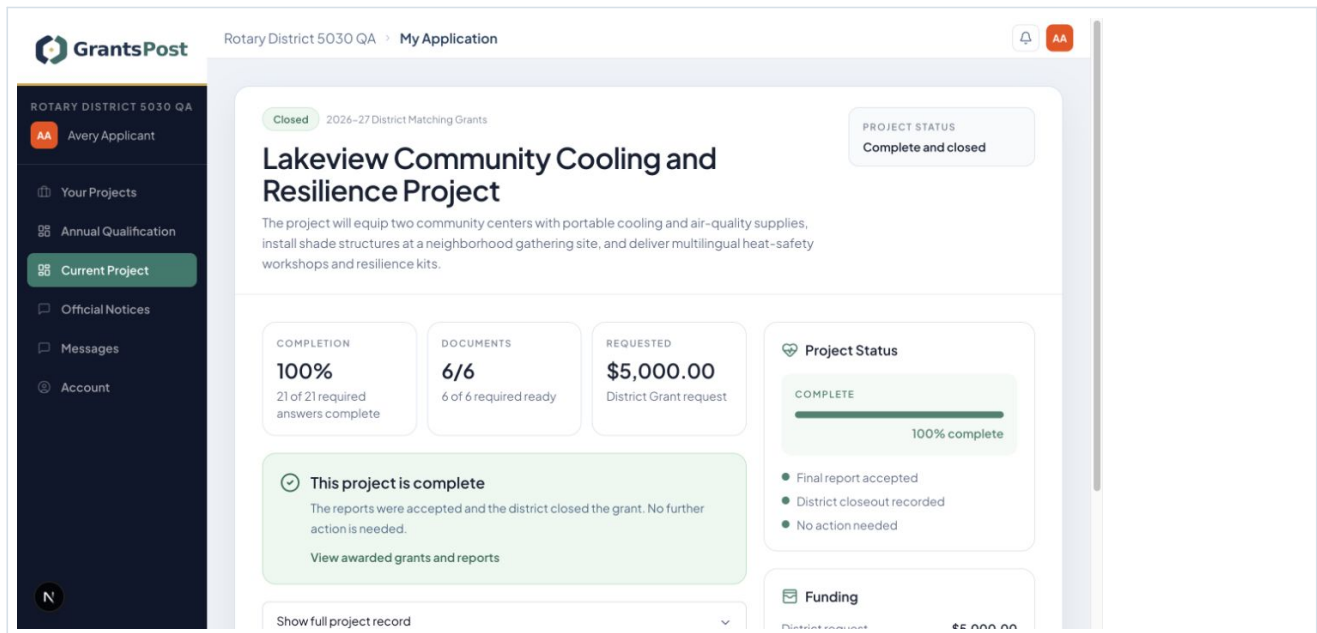
If Submit report is unavailable, open each required item marked Needs attention.

Return to a completed project

WHERE TO BEGIN

From Your Projects, open the completed project.

- 1 Check that the project says Complete and closed and shows 100% completion.
- 2 Open the project record only when you need to review past application, award, finance, or report information.
- 3 No further action is needed unless your district contacts you.



Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The project clearly says that no further action is needed.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.