District or Foundation Administrator Guide

Use this guide if you set up Grant Cycles, manage people and requirements, support active projects, or close grants.

BEFORE YOU BEGIN

Have the approved dates, policies, application questions, document list, scoring guide, qualification rules, and support contacts 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

Screenshots use fictional training records. Names, dates, amounts, and district numbers will differ.

TASK 1 OF 19

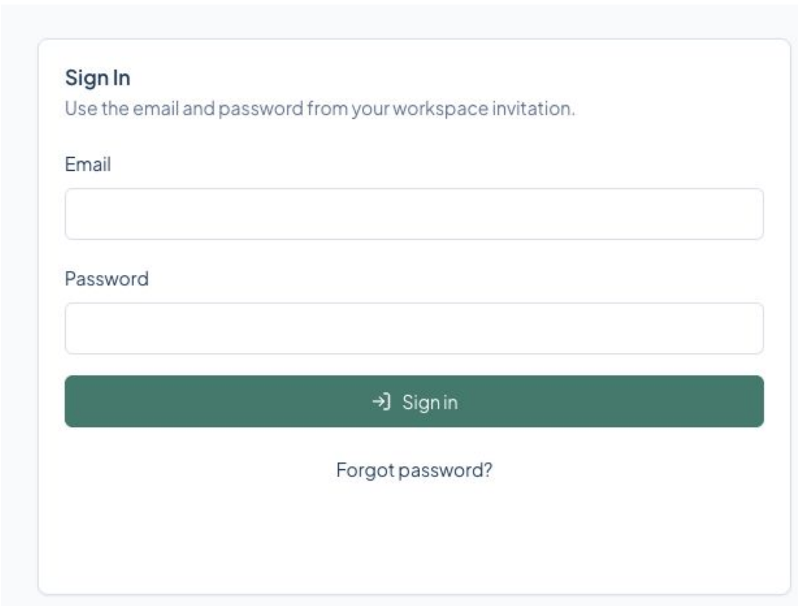
Sign in

WHERE TO BEGIN	Start on the GrantsPost sign-in page.

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?



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
You arrive at the home page for your assigned role.	GrantsPost opens the home page for your assigned role.

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.

TASK 2 OF 19

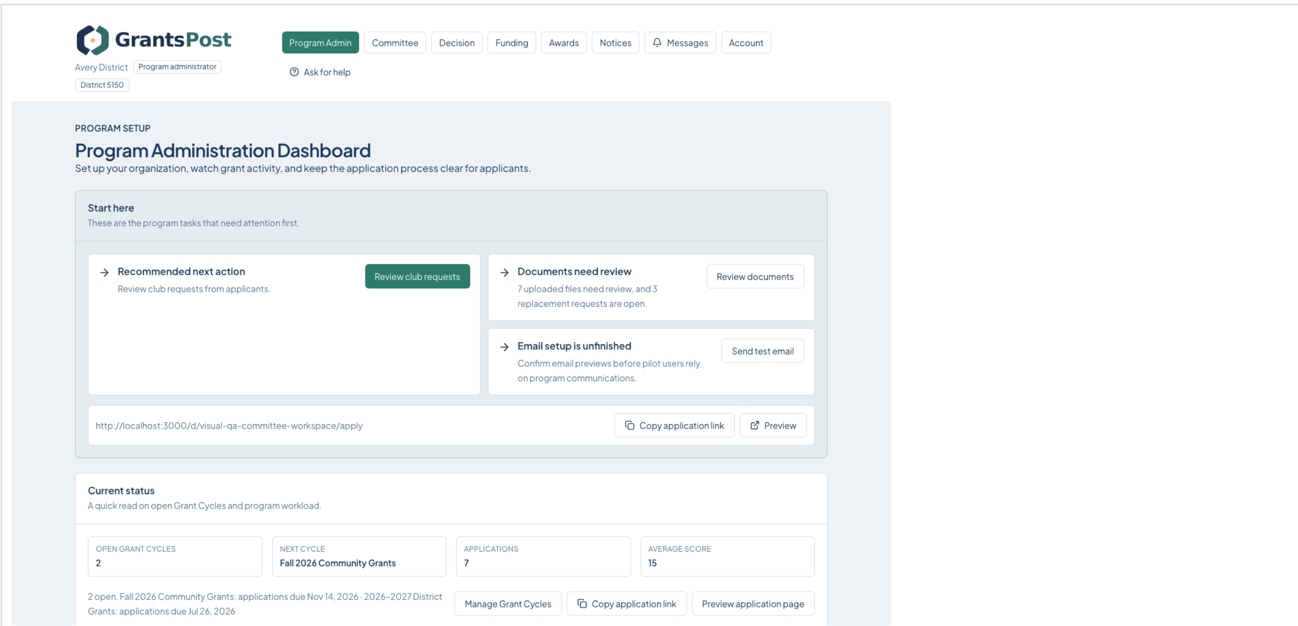
Use the administration dashboard

WHERE TO BEGIN	From the top menu, open District Admin.

1 Read the Recommended action card first.

2 Select the recommended action, such as Create Grant Cycle, Review and open, or Manage Grant Cycle.

3 Return to this dashboard after each setup task to see what still needs attention.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
The dashboard shows no unexpected setup warning.	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.

TASK 3 OF 19

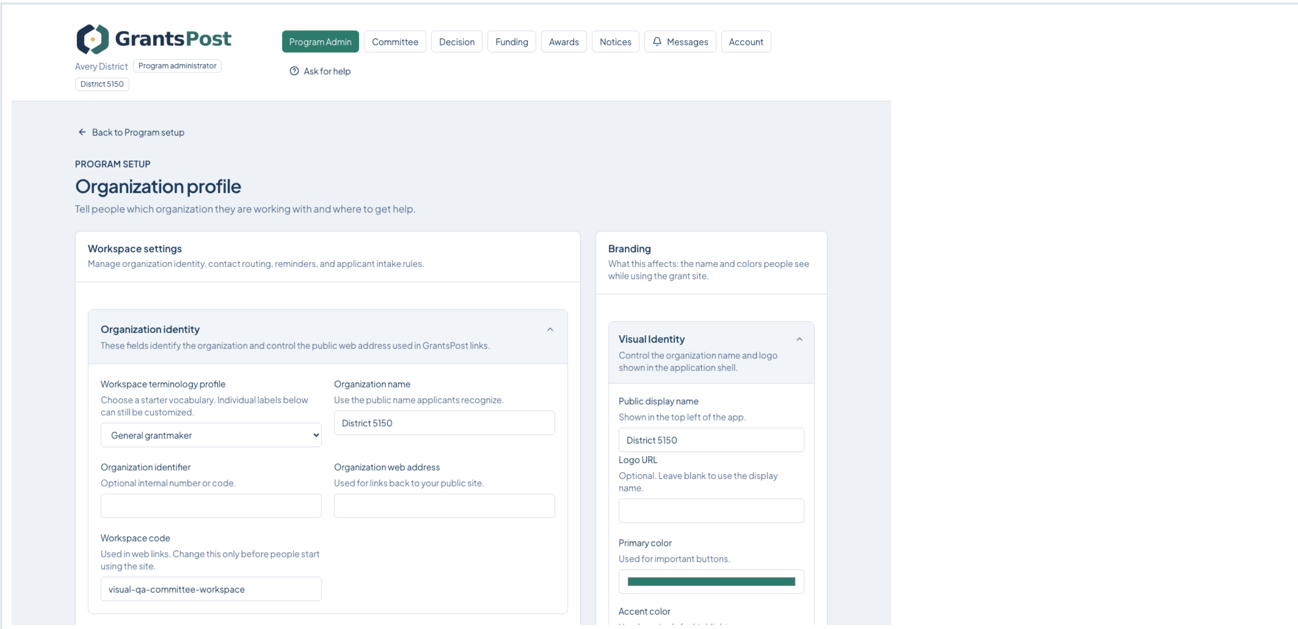
Set the district or foundation profile

WHERE TO BEGIN	From District Admin, open District profile.

1 Open the section you need: district identity, terminology, contact details, or branding.

2 Enter the public information applicants should see.

3 Select Save district profile or Save branding, depending on the section.



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

YOU ARE FINISHED WHEN	**WHAT HAPPENS NEXT**
Applicants see the correct organization name and know where to get help.	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.

TASK 4 OF 19

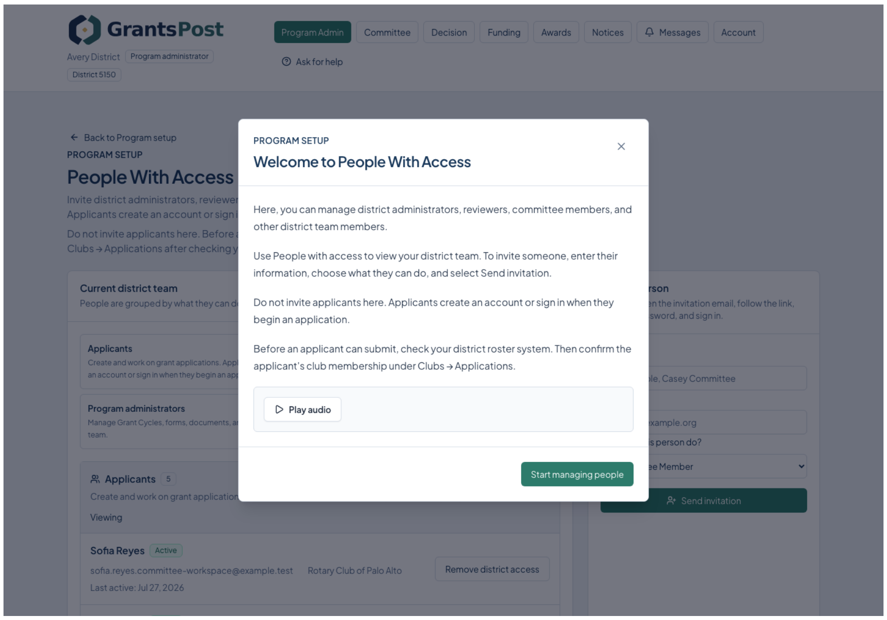
Invite people and assign access

WHERE TO BEGIN	From District Admin, open People With Access.

1 In Invite a Person, enter the person's name and email address.

2 Choose only the access they need.

3 Select Send invitation. If the person already appears, resend the invitation instead of adding a duplicate.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
Every pilot participant appears with the correct role and status.	Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING	If the person already appears, do not create a second record. Open the existing record and resend the invitation.

TASK 5 OF 19

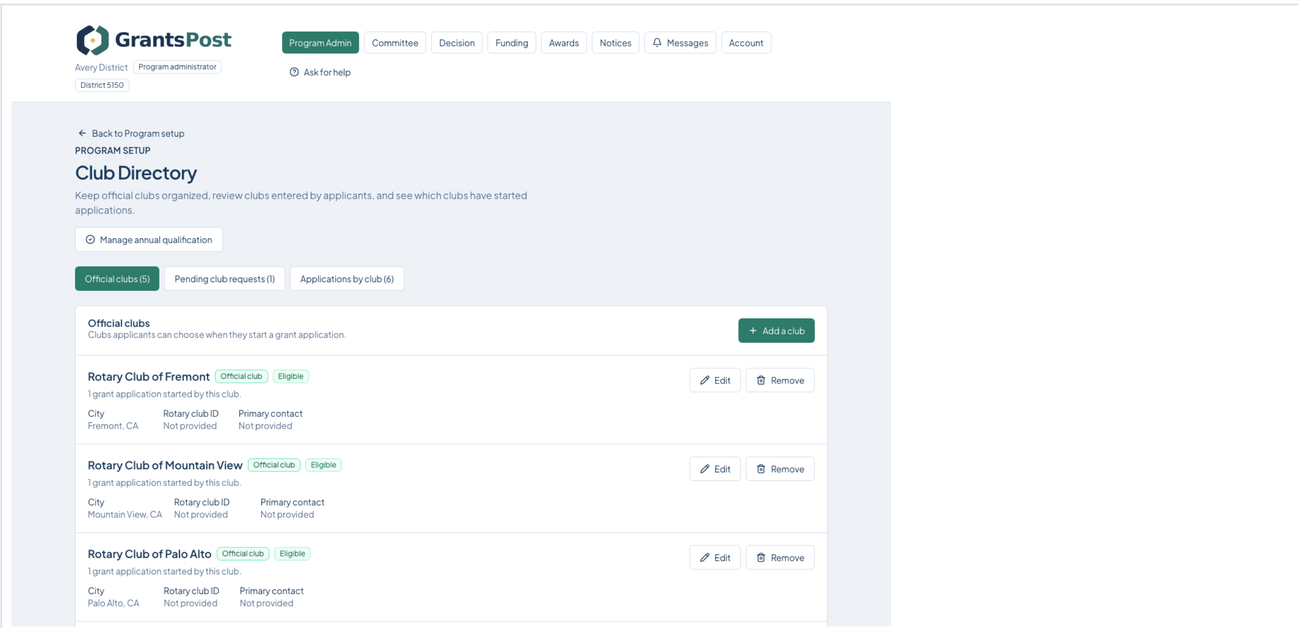
Maintain the club or organization directory

WHERE TO BEGIN	From District Admin, open Club Directory.

1 Look for the club before adding a new one.

2 If it is missing, select Add a club, enter the club details, then select Create club.

3 For an existing club, select Edit, make the change, then select Save club changes.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
Eligible applicants can find or request their organization.	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.

TASK 6 OF 19

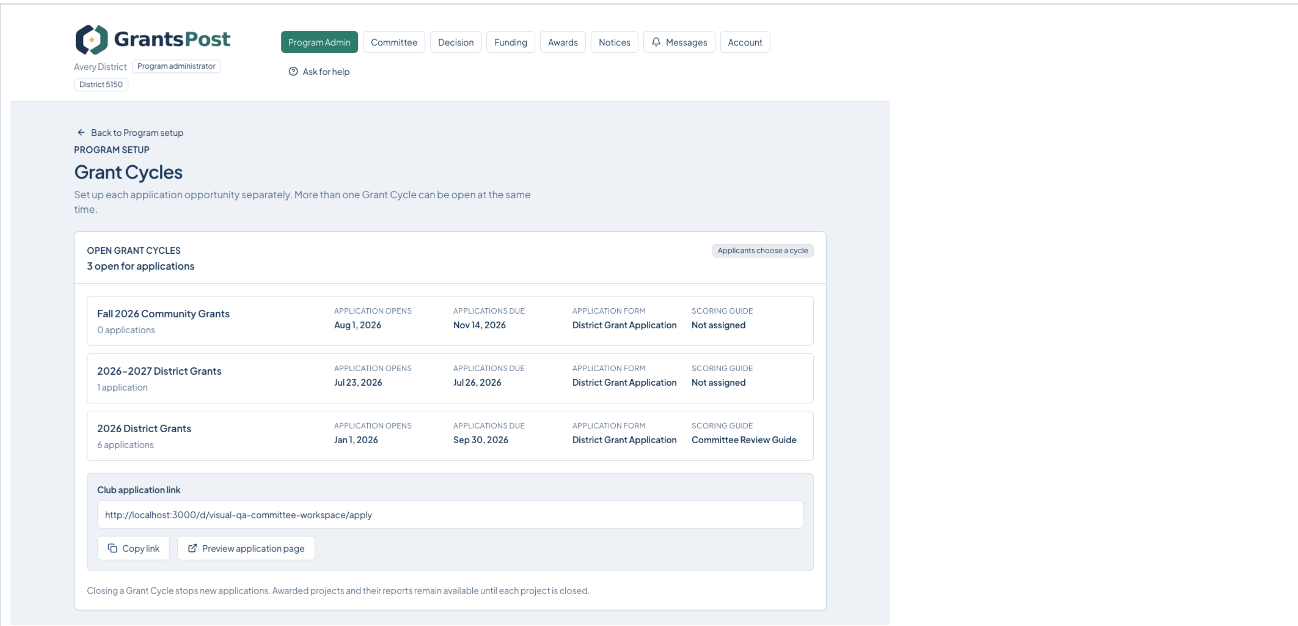
Create and manage Grant Cycles

WHERE TO BEGIN	From District Admin, open Grant Cycles.

1 Select Create Grant Cycle. Give it a clear name, such as Spring 2027 Community Grants, and enter its application dates, form, documents, and scoring guide.

2 Select Create Grant Cycle. Keep the new Grant Cycle in Draft while you finish setup.

3 When every setup item is correct, use Open applications. Other Grant Cycles may stay open at the same time.



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

YOU ARE FINISHED WHEN	**WHAT HAPPENS NEXT**
The intended Grant Cycle is open and the public dates are correct.	Applicants see all open Grant Cycles and choose the correct one before starting.

IF SOMETHING IS NOT WORKING	If Open applications is unavailable, return to the dashboard and complete the setup item named in the warning.

TASK 7 OF 19

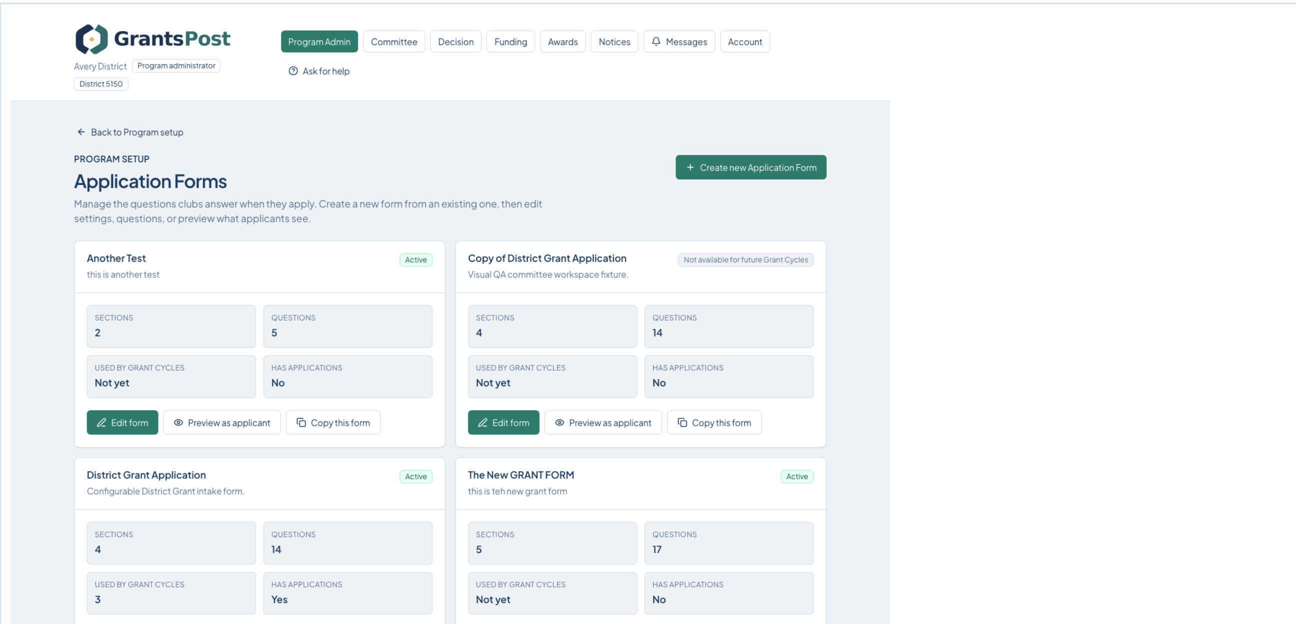
Build the application form

WHERE TO BEGIN	From District Admin, open Application Forms.

1 Open the form for the Grant Cycle, or select Create new Application Form.

2 Use Save section, Add question, and Save question to build the form in the order applicants will use it.

3 Select Preview as applicant and read the whole form before opening applications.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
A preview reads naturally from the first question through submission.	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.

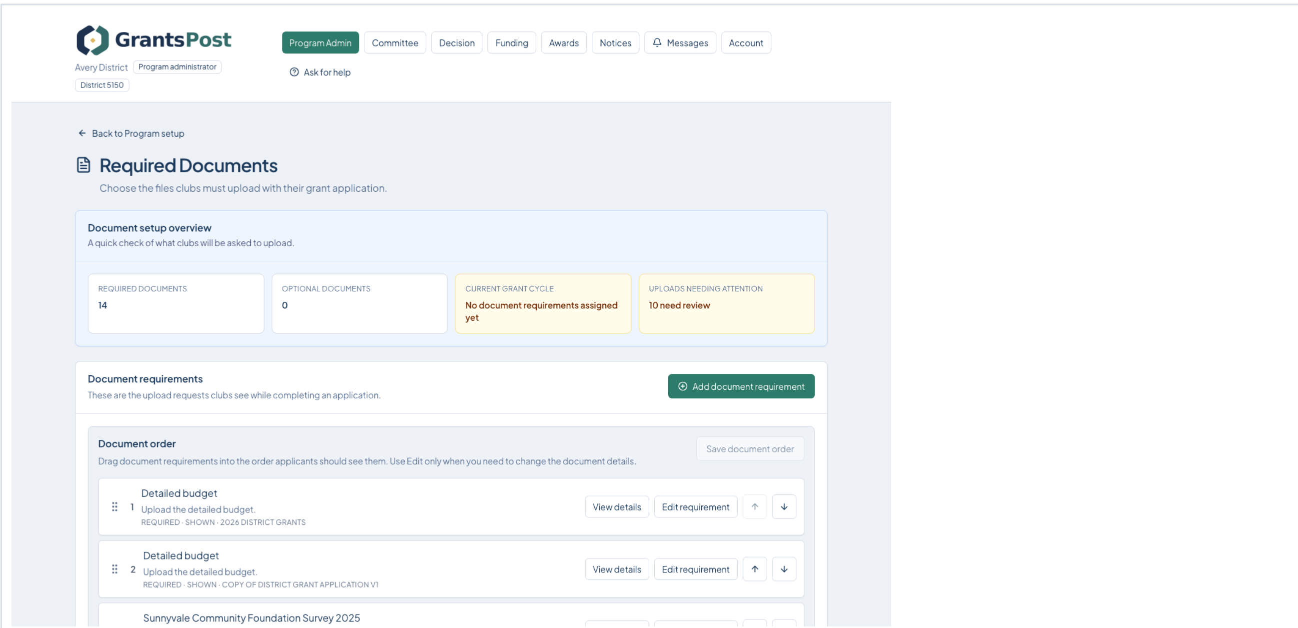
Define required documents

WHERE TO BEGIN	From District Admin, open Required Documents.

1 Select Add document requirement.

2 Enter a clear applicant-facing name, accepted file types, and the condition that makes the document required.

3 Select Add document requirement, then confirm it appears in the correct Grant Cycle.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
The application preview requests the right documents for a sample project.	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.

TASK 9 OF 19

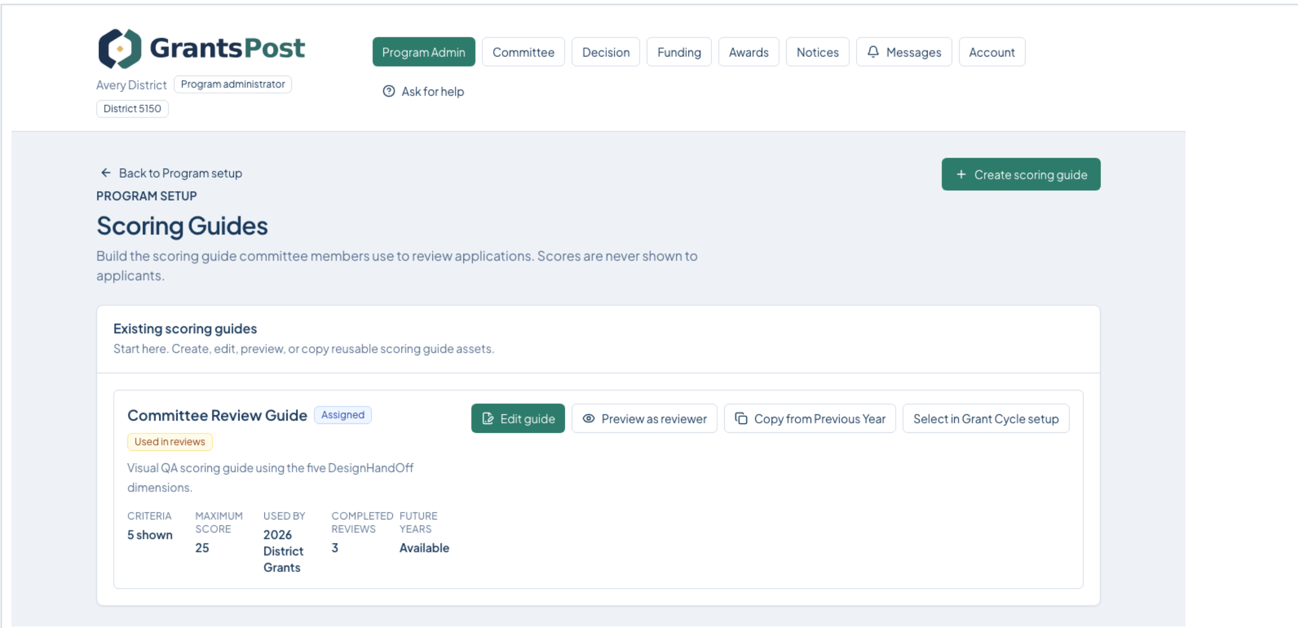
Configure scoring guides

WHERE TO BEGIN	From District Admin, open Scoring Guides.

1 Select Create scoring guide or Edit guide.

2 For each criterion, enter the name, score range, weight, and reviewer instructions; then select Save criterion.

3 Select Save guide, preview it, and assign the published guide to the correct Grant Cycle.



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

YOU ARE FINISHED WHEN	**WHAT HAPPENS NEXT**
A reviewer can score every criterion without guessing what it means.	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.

TASK 10 OF 19

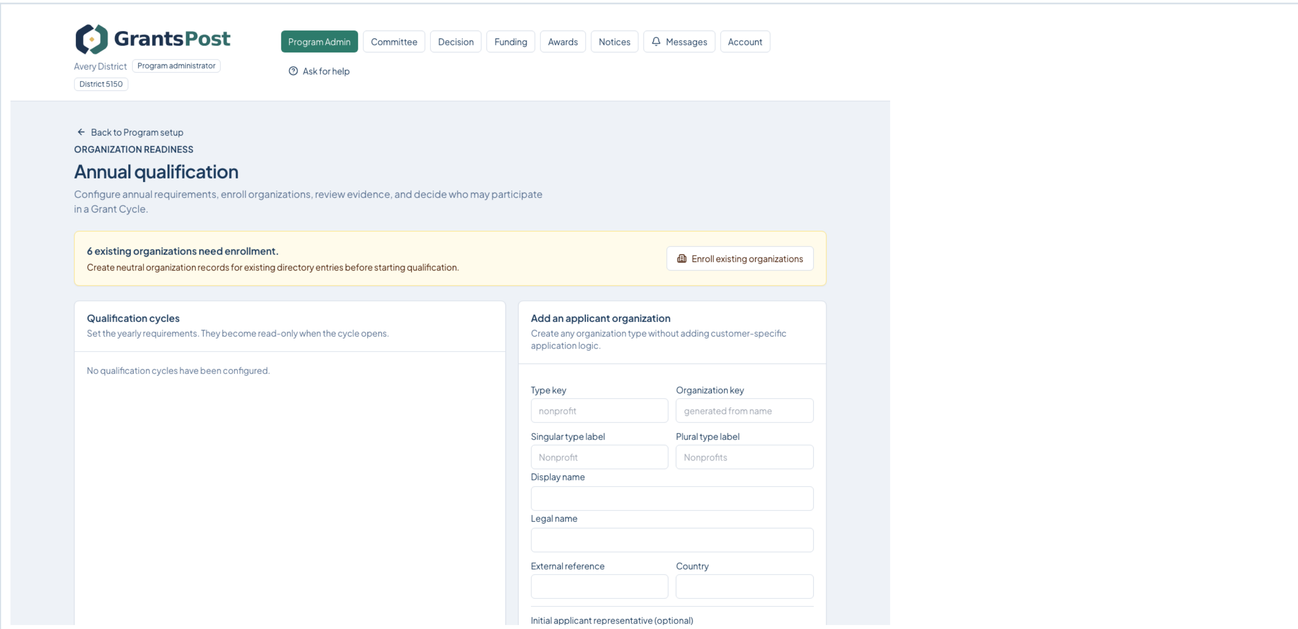
Configure annual qualification

WHERE TO BEGIN	From District Admin, open Annual qualification.

1 Open or create the qualification cycle for the Grant Cycle.

2 Set the training, agreement, evidence, good-standing, and officer requirements.

3 Select Open cycle. If needed, select Enroll all active organizations.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
Qualified organizations can start applications and exceptions are visible for review.	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.

TASK 11 OF 19

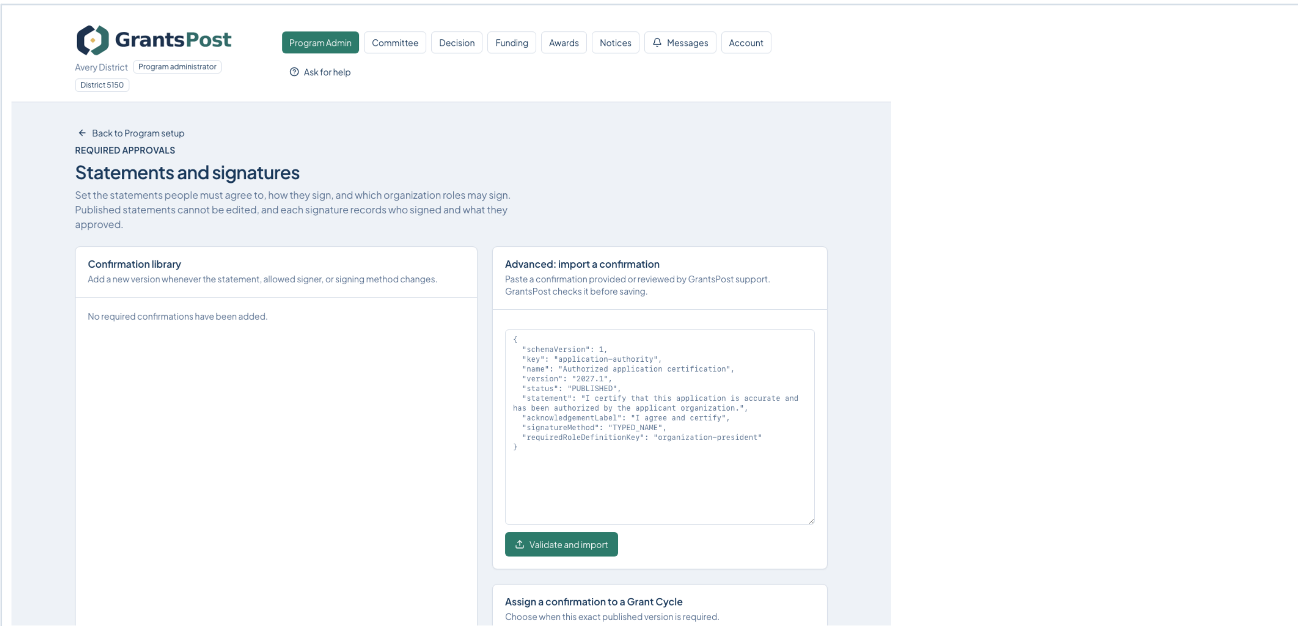
Publish confirmations and signatures

WHERE TO BEGIN	From District Admin, open Statements and signatures.

1 Choose the statement and the person who is allowed to sign it.

2 Review the exact wording before publishing. Published wording is kept with past signatures.

3 Publish the new version, then confirm it is assigned to the correct Grant Cycle.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
Every required statement is tied to the correct role and Grant Cycle.	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.

TASK 12 OF 19

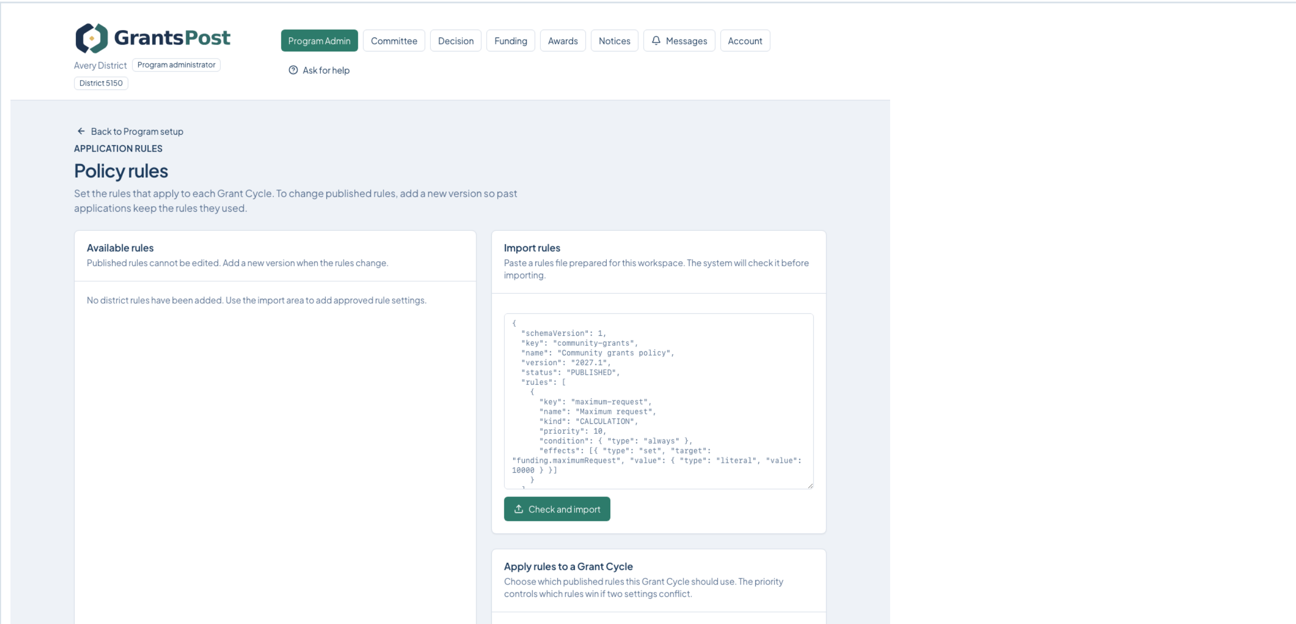
Apply policy rules

WHERE TO BEGIN	From District Admin, open Policy rules.

1 Open the rule set for the Grant Cycle.

2 Check eligibility, request limits, matching rules, and any priority order.

3 Save and publish the rule version, then test it with a sample application.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
A sample application produces the expected limits and requirements.	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.

TASK 13 OF 19

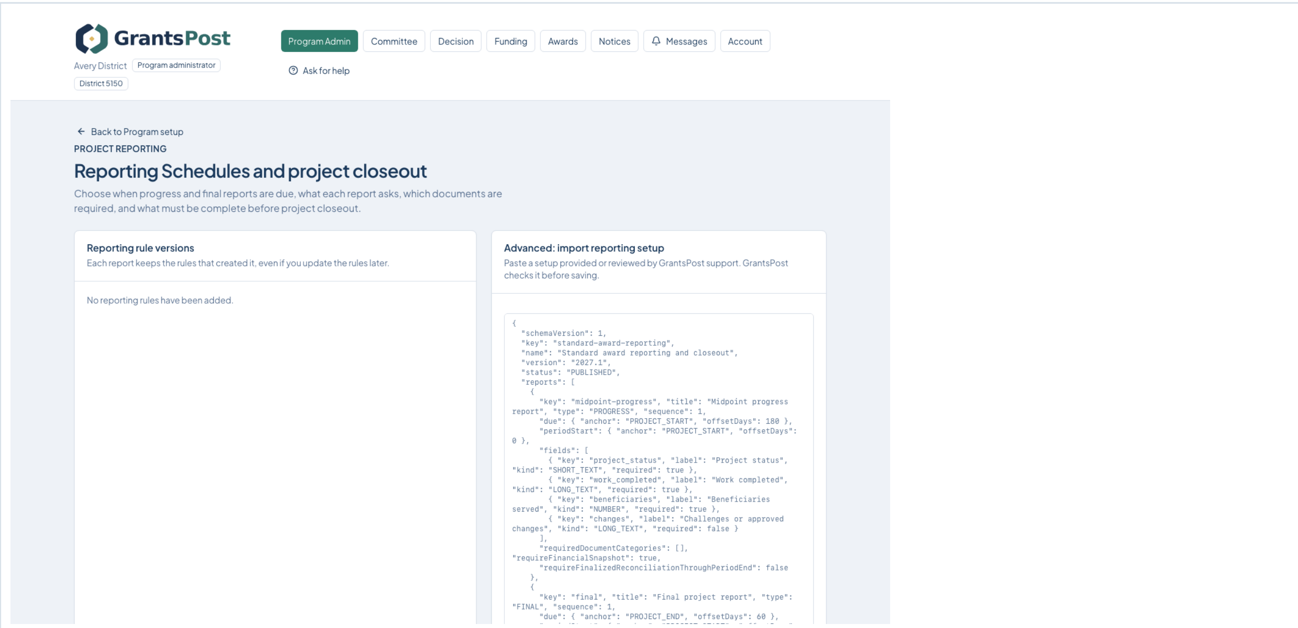
Prepare reporting and closeout

WHERE TO BEGIN	From District Admin, open Grant Reports.

1 Confirm each project's Project Period and Reporting Schedule before awards are issued.

2 Check required questions, documents, and certifications.

3 Use the Scheduled, Waiting for review, Due soon, Overdue, Returned for revisions, and Closed views to monitor later work. Reporting stays available after the Grant Cycle closes.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
Awarded projects will receive the intended report schedule and closeout checks.	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.

TASK 14 OF 19

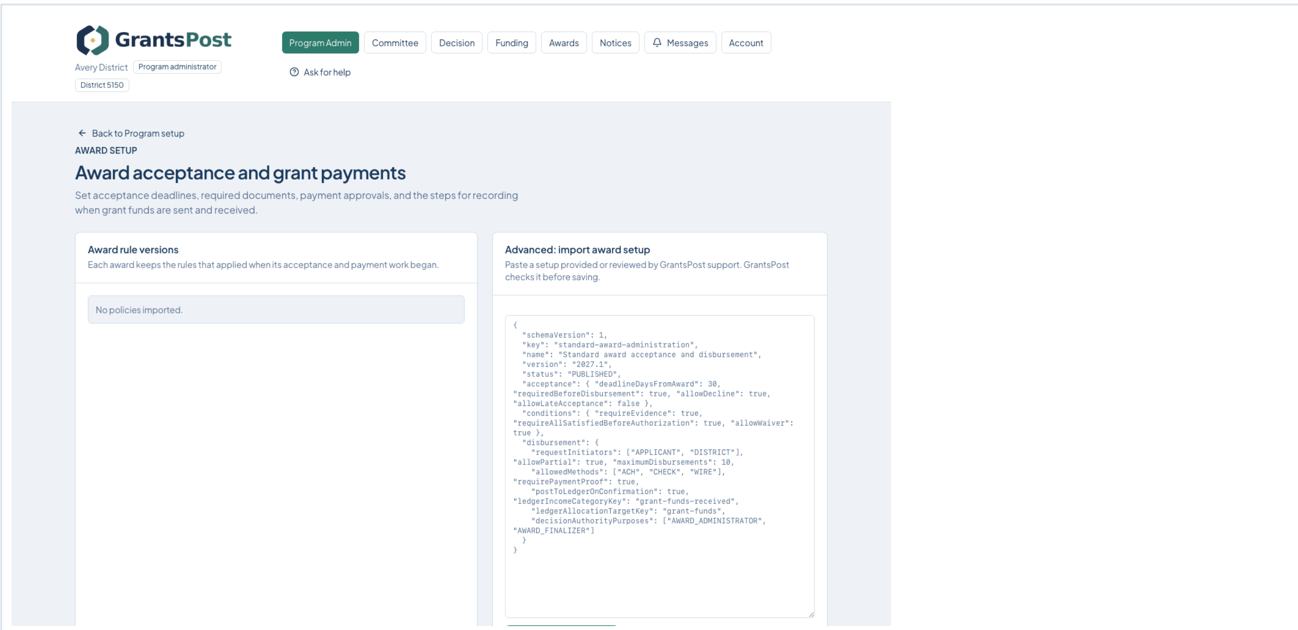
Manage award acceptance and grant payments

WHERE TO BEGIN	From District Admin, open Award acceptance and grant payments.

1 Open the award and check acceptance, requirements, and grant payment status.

2 Use Record decision for submitted requirements and grant payment requests.

3 After a transfer is sent, enter its date, reference, and payment proof, then select Record sent transfer.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
Acceptance and the intended grant payment are complete with supporting documents.	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.

TASK 15 OF 19

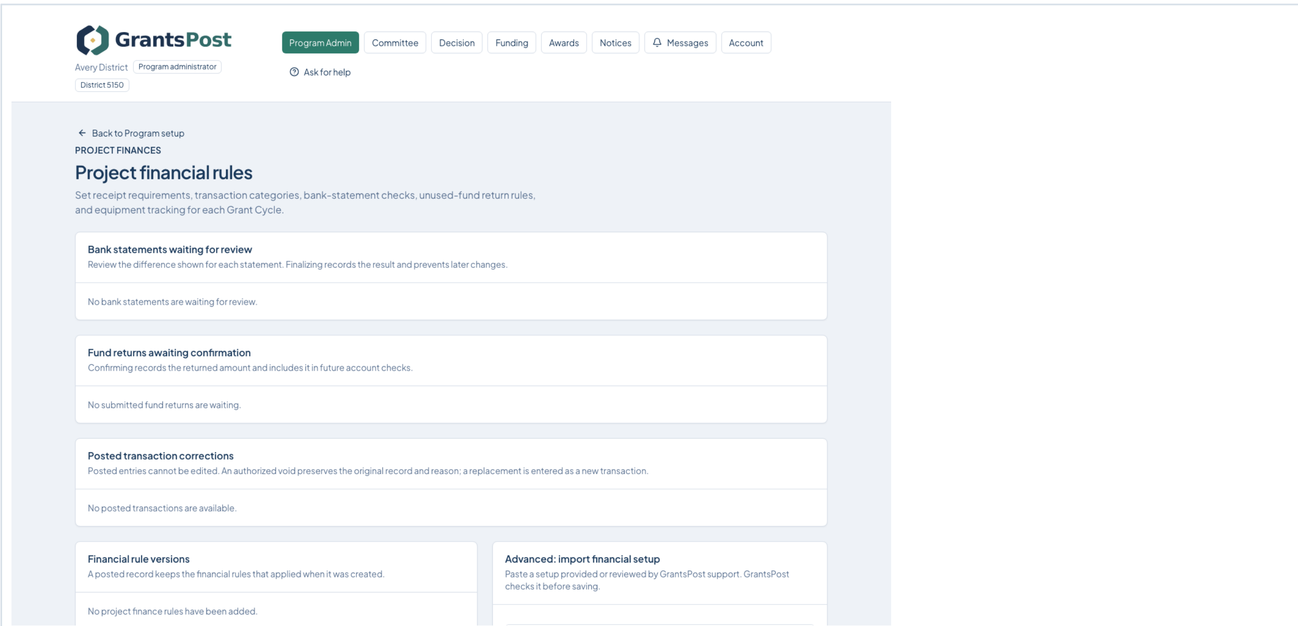
Review financial controls

WHERE TO BEGIN	From District Admin, open Financial controls.

1 Open each item waiting for attention and compare it with its evidence.

2 Use Confirm returned funds for a verified return. Use Void entry only with a clear reason when a posted entry is wrong.

3 Confirm that no finance item still needs district action.



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

YOU ARE FINISHED WHEN	**WHAT HAPPENS NEXT**
No financial item that needs administrator attention remains.	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.

TASK 16 OF 19

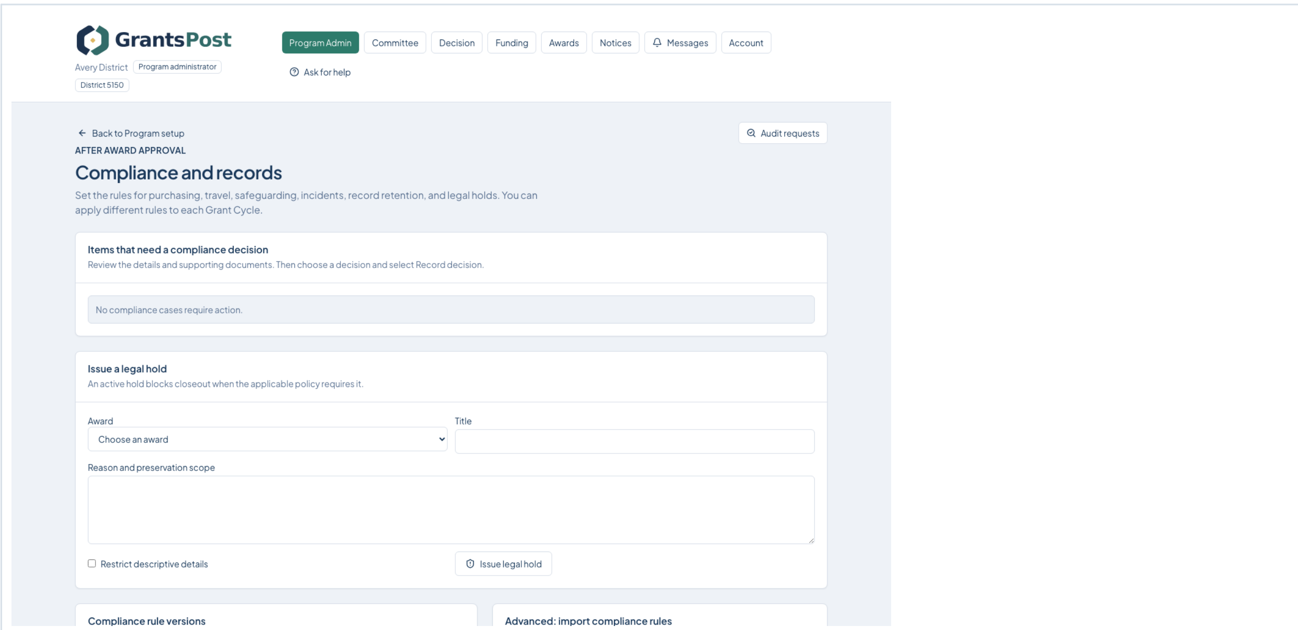
Manage compliance

WHERE TO BEGIN	From District Admin, open Compliance and records.

1 Open each submitted compliance case and review the evidence.

2 Choose the allowed outcome, enter a decision note, then select Record decision.

3 Keep confidential matters within the people authorized to view them.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
Every submitted case has a documented decision or next action.	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.

TASK 17 OF 19

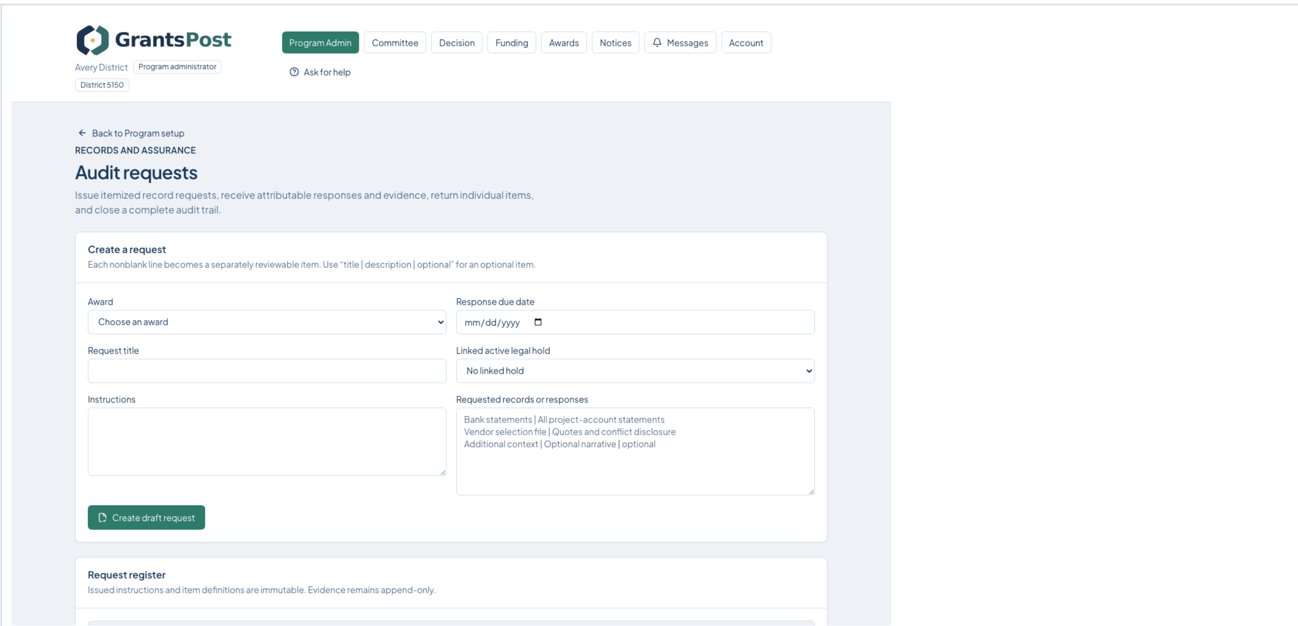
Issue and review audit requests

WHERE TO BEGIN	From District Admin, open Audit requests.

1 Create a request only when you can name the records needed, the due date, and the instructions.

2 For each submitted item, choose Accept item, Return item, or Waive item; add a note and select Save item review.

3 Close the audit only after every required item is resolved.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
All required items are resolved and the audit request is closed.	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.

TASK 18 OF 19

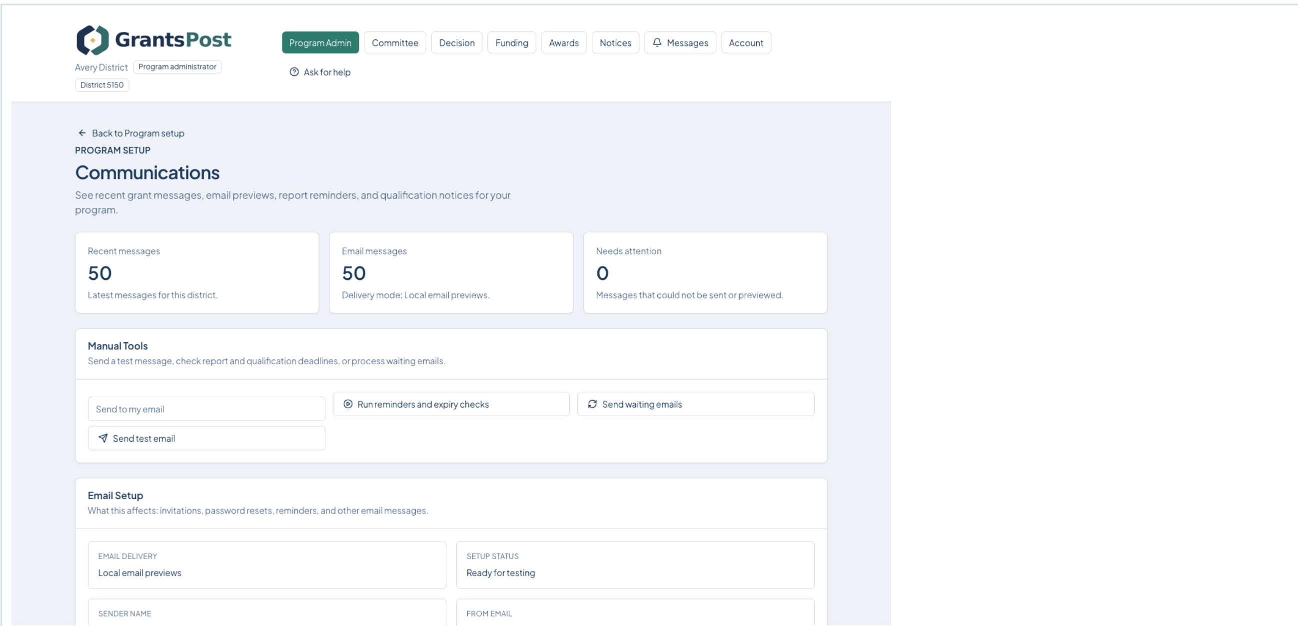
Monitor communications

WHERE TO BEGIN	From District Admin, open Communications.

1 Open messages marked Needs attention.

2 Check in-app delivery and email delivery separately.

3 Use the retry action only for a failed email record. In-app delivery remains the official record.



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

YOU ARE FINISHED WHEN	WHAT HAPPENS NEXT
No important message is left in Needs attention.	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.

TASK 19 OF 19

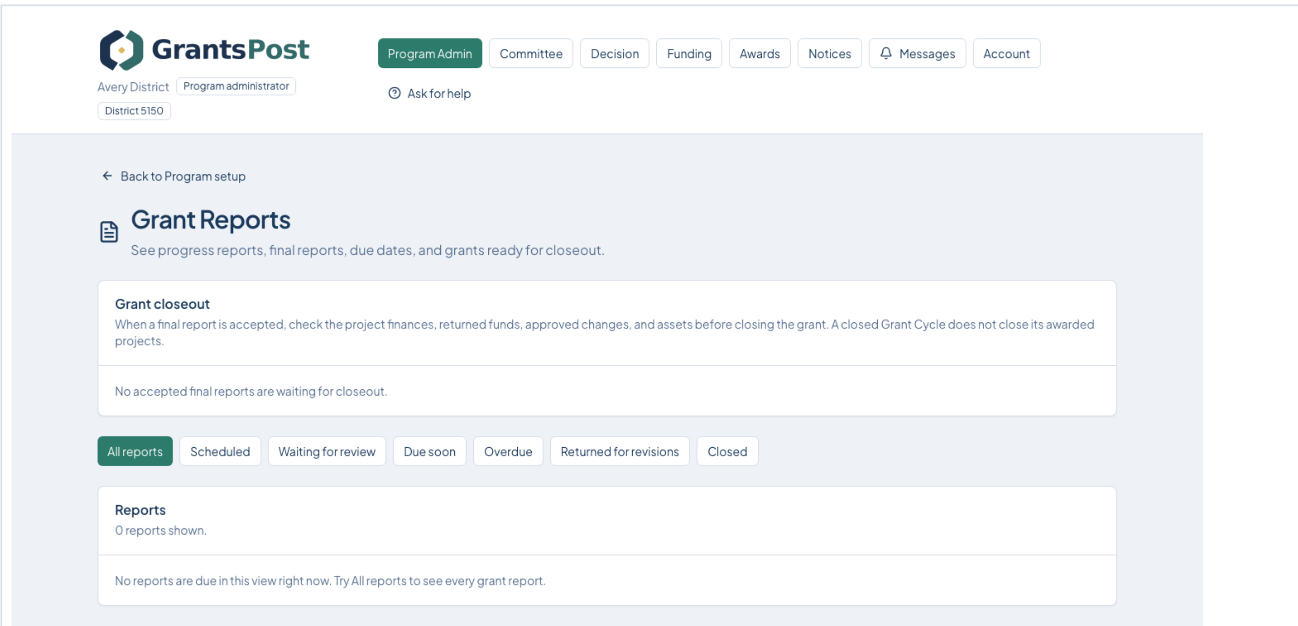
Close the grant

WHERE TO BEGIN	From District Admin, open Grant Reports and find the accepted final report.

1 Select Check closeout readiness.

2 Resolve every item marked Needs attention, including reports, finances, returned funds, project changes, assets, compliance, and legal holds.

3 When every item says Ready, select Close grant. Close the project only after its final report and checks are accepted; closing its Grant Cycle is not enough.



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

YOU ARE FINISHED WHEN	**WHAT HAPPENS NEXT**
The grant status is Closed and the retention date is recorded.	The grant remains available as history; no active closeout work remains.

IF SOMETHING IS NOT WORKING	Select the first Needs attention check, resolve it in its own page, then run Check closeout readiness again.