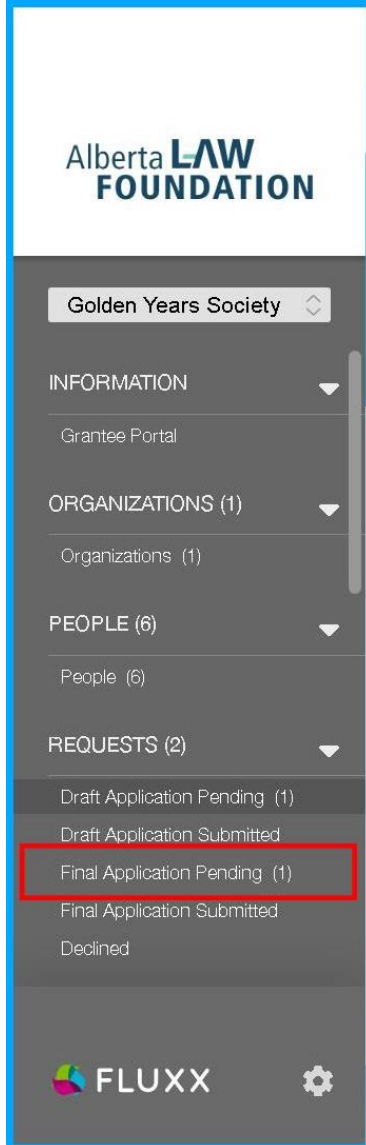


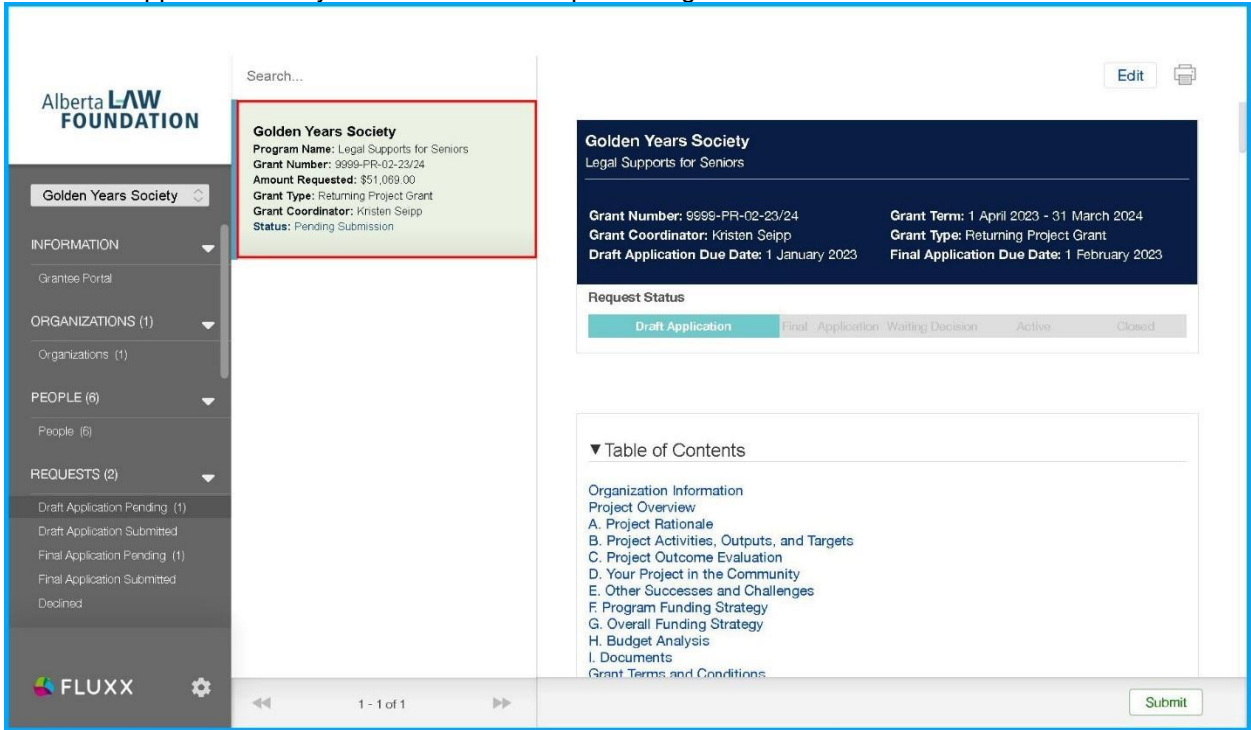
## Grantee Portal Training Manuals

### How to Complete the Grant Terms and Conditions Section of the Application

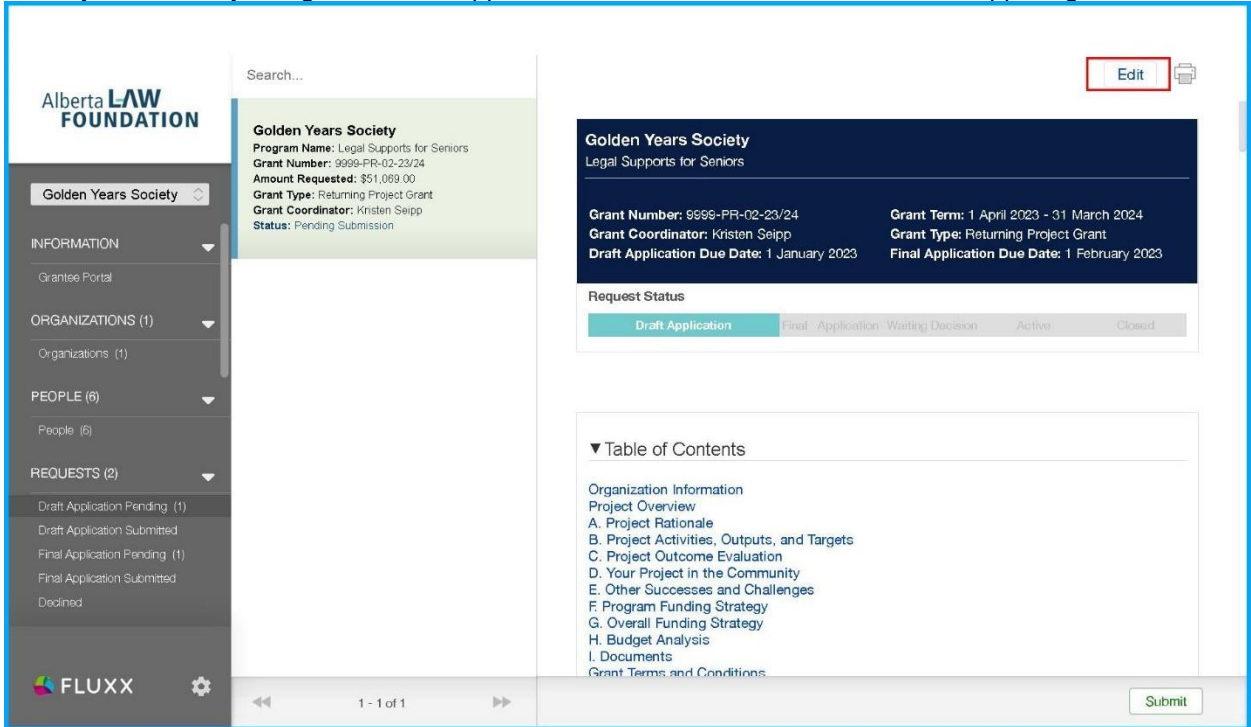
1. The grant terms and conditions section appear in both the draft application and final application parts. However, this section is only required to be completed in the “Final Application Pending” card. Click on the “Final Application Pending” card under the “Requests” section.



2. Select the application that you would like to complete the grant terms and conditions for.



3. Review the application in its entirety as well as the Alberta Law Foundation Funding Policies.
4. When you are ready to sign-off on the application, click on the “Edit” button on the upper right side.



5. Navigate to the table of contents and click on "Grant Terms and Conditions." Clicking on the header in the Table of Contents will bring you to the corresponding section of the application. You also have the option to scroll down the page until you reach that section and then expand the section by clicking on the arrow.

**Draft Application Due Date:** 1 January 2023    **Final Application Due Date:** 1 February 2023

**Request Status**

**Draft Application**    Final Application    Waiting Decision    Active    Closed

**Please note:** The portal does not autosave; therefore, you must click the [Save] button to ensure your data will not be lost.

If you select [Cancel], none of your changes to the application will be saved.

▼ **Table of Contents**

- Organization Information
- Project Overview
- A. Project Rationale
- B. Project Activities, Outputs, and Targets
- C. Project Outcome Evaluation
- D. Your Project in the Community
- E. Other Successes and Challenges
- F. Program Funding Strategy
- G. Overall Funding Strategy
- H. Budget Analysis
- I. Documents
- Grant Terms and Conditions**

▼ **Organization Information**

Cancel    Save and Continue    Save and Close

6. Scroll down to the two drop-down fields. Click on both drop-downs and select "I Agree".

The screenshot shows a web form with two dropdown menus. The first dropdown menu is open, showing the option "I Agree" selected. The second dropdown menu is closed. Below the dropdown menus is a section titled "Organization Authorized Signatory" with three dropdown menus for Name, Position, and Email. The Name dropdown menu is open, showing "Bridget Jones" selected. The Position dropdown menu is open, showing "Program Coordinator" selected. The Email dropdown menu is open, showing "jcorpuz@albertalawfoundation.org" selected. At the bottom of the form are three buttons: "Cancel", "Save and Continue", and "Save and Close".

By selecting "I Agree", I acknowledge that I am an authorized signatory for the organization to which this application applies.

By selecting "I Agree", I acknowledge that I have read the application in full, the Funding Policies set out in full on the Foundation website and I understand and agree to the terms and conditions set out above on behalf of my organization.

**Organization Authorized Signatory**

Name: Bridget Jones

Position: Program Coordinator

Email: jcorpuz@albertalawfoundation.org

Buttons: Cancel, Save and Continue, Save and Close

7. Verify that all the information in the Organization Authorized Signatory fields is correct. Click on the date in the Organization Authorized Signatory sub-section and select the date that the Grant Terms and Conditions were agreed upon.

application in full,  
the Funding Polices  
set out in full on the  
Foundation website  
and I understand  
and agree to the  
terms and  
conditions set out  
above on behalf of  
my organization.

### Organization Authorized Signatory

Name:

Position:

Email:

Date:

*Note: If this application is approved, the organization will be required to sign the Grant Terms and Conditions. The signature of the organization Board of Directors, the organization Authorized Signatory and a Board Signatory will be required on the application.*

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

8. Click on the “Save and Continue” or “Save and Close” button to save your work.

application in full,  
the Funding Polices  
set out in full on the  
Foundation website  
and I understand  
and agree to the  
terms and  
conditions set out  
above on behalf of  
my organization.

### Organization Authorized Signatory

Name	<input type="text" value="Bridget Jones"/>
Position	<input type="text" value="Program Coordinator"/>
Email	<input type="text" value="jcorpuz@albertalawfoundation.org"/>
Date	<input type="text" value="25/7/2022"/>

*Note: If this application is approved by the Alberta Law Foundation Board of Directors, the organization will be required to sign a Grant Agreement via DocuSign following the grant decision. The signature of the Organization's Authorized Signatory and a Board Signatory will be required on the Grant Agreement.*

Notes:

- This Grant Terms and Conditions section must be filled out by your Organization Authorized Signatory. The name, position, and email in this section [blue box] is pre-filled and cannot be changed in the Grant Terms and Conditions section of the application. If changes need to be made to this information, you must make the changes in the Organization Information section at the beginning of the application [red box].

The screenshot displays two side-by-side form sections. The left section, titled 'Organization Information', contains several dropdown menus: 'Organization' (Golden Years Society), 'Location' (Golden Years Society - headquarters), 'Primary Contact' (Bridget Jones), 'Organization Authorized Signatory\*' (Bridget Jones), and 'Board Signatory\*\*' (Joshua Test). Each dropdown has an 'Add New' link to its right. A red rectangular box highlights the 'Organization Authorized Signatory\*' dropdown. Below these fields are two paragraphs of explanatory text. The right section, titled 'terms and conditions set out above on behalf of my organization.', contains a 'User' card with fields for 'Name' (Bridget Jones), 'Position' (Program Coordinator), 'Email' (jcorpuz@albertalawfoundation.org), and 'Date' (25/7/2022). A blue rectangular box highlights the 'Name' dropdown. Below this section is a note: 'Note: If this application is approved by the Alberta Law Foundation / organization will be required to sign a Grant Agreement via DocuSign decision. The signature of the Organization's Authorized Signatory a will be required on the Grant Agreement.'

- If you would like to change the Name, Position, or Email value, you must change it in the "User" card and change the user information directly. If you do not know how to do this, please check the How to Create Users and Update User Information training manual.