Setting Up a Foundation Proposal Account Using Foundant Interface
A Guide for UNCG PIs

Background:

Foundant Technologies makes a very user-friendly grant application interface currently being adopted by many foundations (including CFGG, CFNC, etc). This interface is designed so that individual PIs have their own accounts. Because awards are made to UNCG, and Valera Francis, Director of OSP, is the Institutional Authorizing Official (and signatory), we want to ensure that the account is linked to the University.

Most PIs prefer to make the account on their own and load in the materials as they receive departmental and OSP review and approvals. Prior to submission, your OSP Grants Specialist will ask you for your username and login so that we can review to application in the system before submission. If you prefer, your Grants Specialist can make an account for you and upload the application. We can easily print the question list and send to you as you write your proposal.

Setting Up Your Account
Step 1 – Start!
Each foundation has their own version of this platform – even if you made an account with the Community Foundation of NC, it is different from the Community Foundation of Greater Greensboro! If you don’t already have an account for the foundation you are applying to, Click “Create New Account” to start.
Step 2: Enter Organization Information
Please enter the organization information as shown below.

Optional – for Organization Name, you can add your center/department/unit after “The University of North Carolina at Greensboro” (i.e. you can use “The University of North Carolina at Greensboro (UNCG) Center for New North Carolinians (CNNC)"

Optional – You may use your center/department/unit website.

Leave all other fields as marked below so that any awards come to Valera in OSP

![Create New Account](image)

Using the browser’s back button will delete your registration information.

Fields with an asterisk (*) are required.

Organization Information
NOTE: You will not be able to change your organization information after registering.

Organization Name*
The University of North Carolina at Greensboro

EIN / Tax Identification Number (XX-XXXXXXX)*
56-6001468

Web Site
www.unCG.edu

Telephone Number (XXX-XXX-XXXX xXXX)*
336-334-5878

Organization Email
research@unCG.edu

Address 1*
1111 Spring Garden Street

City*
Greensboro

State*
NC

Postal Code*
27412-5013

Country
USA

Cancel Account Creation  Next Step

Grant Management Software provided by FOUNDANT technologies
Step 3: Enter the PI Info
Enter the contact Information for the lead PI. Be sure to update your email and phone. You can use your campus address or copy the Organization Address (OSP).
Step 4: Answer “No”
You will designate Valera on the next screen.

Create New Account
This registration process has multiple steps you must complete before you can apply.

⚠️ Using the browser’s back button will delete your registration information.

ℹ️ Fields with an asterisk (*) are required.

Executive Officer (Executive Director, CEO, President, Program Director, etc.)

Are you the Organization’s Executive Officer?*
- Yes
- No

Previous Step  Next Step
Step 5: Enter Authorized Official Information (aka “Executive Officer”)
Please enter information as shown below. “Copy Address from Organization” will be helpful.
Step 5 – Set a Password

Step 6 – Verify
After you “finish” on the last screen, check your email, then verify that you received an email from the foundation.

Step 7 – Store your information in a safe place!
Some of your OSP contacts like to securely store passwords in password managers like 1Password or lastpass. Whatever your method, make sure it is safe!

Step 8 – Share with your OSP Grants Specialist for review and submission.
They will need to log in to review and verify prior to submission. As policy, OSP is also required to submit your proposal. We will get verification from you before we submit. We’re here to help ensure a smooth submission and the best chance at a successful project!

Final Reminders!
Please, do not submit a proposal without first creating a Ramses file or without first allowing your Grants Specialist to review the proposal! We will submit the proposal on your behalf.
And remember, once you receive an award, Valera Francis, Director UNCG OSP, is the person authorized to review and accept an award. Please forward any award document, terms, and conditions to her or your Grants Specialist.

Thank you!

Updated 8/2/2016
UNCG Office of Sponsored Programs
(336) 334-5878
research@uncg.edu