

GivingHub Forms

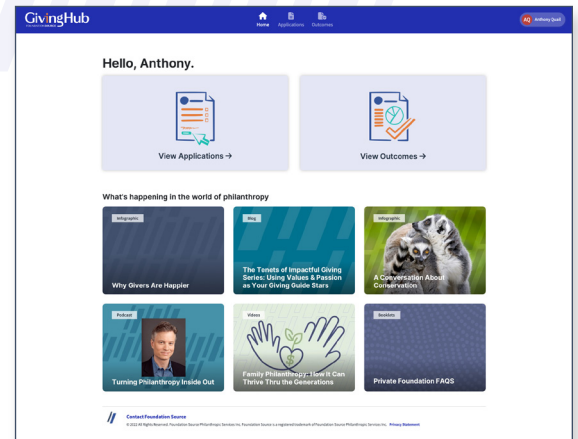
What was done?

All current Application Processes, Forms and Outcomes will now be completed by nonprofits in our new grantee Portal, the GivingHub.

What can nonprofits do in the GivingHub?

After registering for their secure GivingHub account, nonprofits will have many benefits with the portal:

- Complete Applications and Outcome Forms
- View and Track the Status of Applications
- Track Payment Status and Amount
- Complete Saved Documents
- Download Completed Documents
- Enjoy Specially Curated Resources
- Future: Invite Other Nonprofit Members to Collaborate
- Future: Nonprofit & Grantor 2-Way Communication



What applicant resources are available?

We have several resources to assist applicants with this change—videos, presentations and webinars.

[Click here to learn more.](#)

We also added some standard text to all Welcome Pages above the 'Start Application' button, to give the nonprofits advance notice:

Beginning June 1st, you will have to register and sign-in on our applicant portal, the GivingHub, to fill out an application form. Going forward the new portal will allow you to log in to access your applications, view and track status, track payments, complete saved documents and download completed forms.

What changes will there be in Foundation Source Online related to Applications and Outcomes, review, and processing?

Other than the recent release where Applications, Forms, and Outcomes are all located on one page, there will be no changes. Everything in the day-to-day managing of your Applications and Outcomes remains the same.

Create & Manage Applications and Outcomes

We have recently added a new feature in Foundation Source Online (FSOL) where you can Create & Manage Application and Outcome Forms. Applications and Outcomes created in FSOL have editing capabilities.

In the following section, we will describe how the FSOL and Foundation Source Team created forms will function in the Create & Manage feature.

APPLICATION PROCESS

All Applications Processes (Welcome Page, Eligibility Quiz, Application) created in FSOL can be edited and duplicated. These processes will all show up in the Manage Applications under status.

Foundation Source Team created Application Processes cannot be edited or duplicated. These processes will not show up in the Manage Applications under status. However, in the future, Eligibility Quiz and Applications will be editable/duplicated.

OUTCOMES

All Outcomes created in FSOL or by the Foundation Source team can be edited. All Outcomes forms will show up in the Manage Outcomes list in the status view. In the future, the duplicate feature will be available.

SUPPORTING FORMS

In the future, we will have a new feature to create and manage Supporting Forms. This will work like the create Outcomes Report with a two-step wizard. These forms are generally used to 'Ask for Information.'

PERMISSIONS

By default, the Foundation Representative has the entitlement to Create & Manage Applications and Outcomes. If you would like this permission, reach out to your Foundation Representative or your Private Client Advisor.

STILL HAVE QUESTIONS?

We're here to help! Contact your PCA today. Call 800.839.0054 or email us at info@foundationsource.com.

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