Texas Instruments - Grant application instructions for grantees
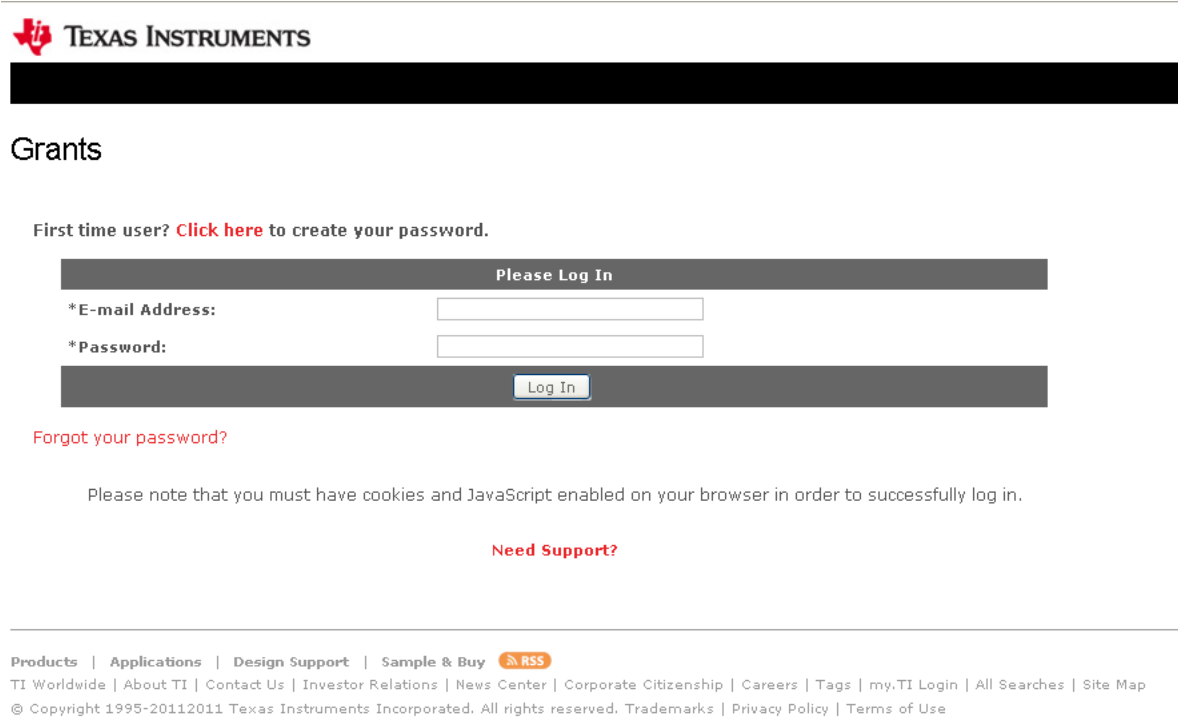
1] After going through the eligibility quiz you will be sent to the Login screen shown below:


Here you have two choices:

A] If you are a first time user, follow the directions starting on page 2.

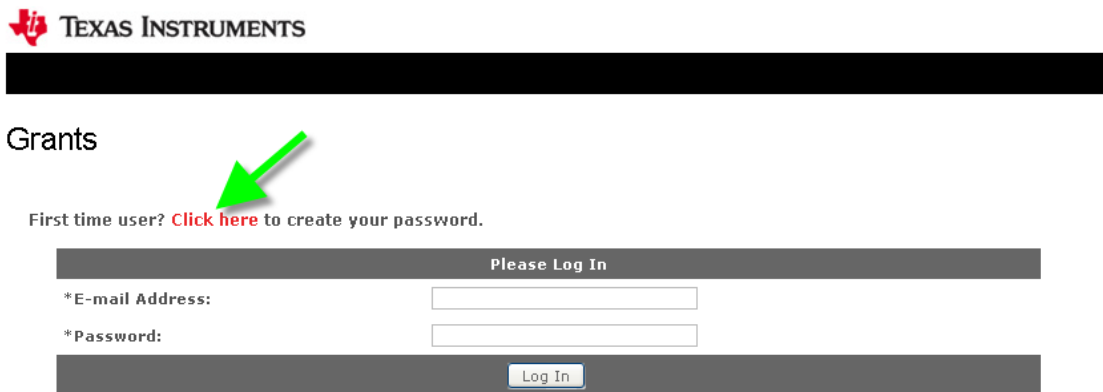**B]** If you are already registered, follow the directions starting on page 4.

Both of these paths will eventually lead you to the Welcome page starting on page 5.

NOTE: There will be a "Need Support" link at the bottom of every page. Using this link will take you to a list of frequently asked questions and also allow you to email a question to the support staff. The support staff is available to answer questions via email Monday – Friday, 8:30 AM – 5:30 PM Eastern Time. They will answer your email in the order in which they are received.

Texas Instruments - Grant application instructions for grantees
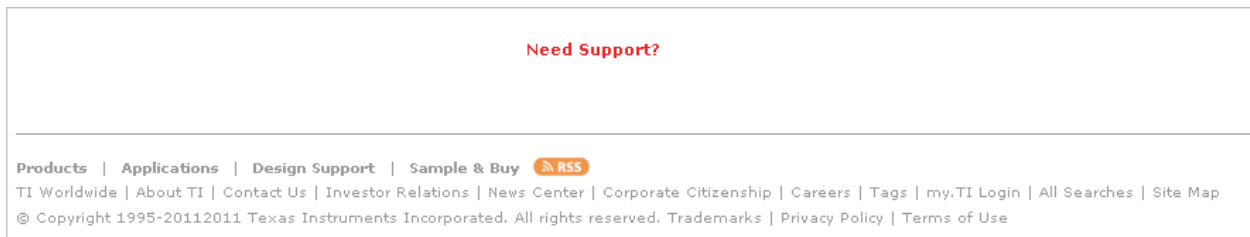
A. FIRST TIME USER

1] If this is your first time applying to Texas Instruments for a grant, please click on the "First Time User?" button. (See screenshot below)
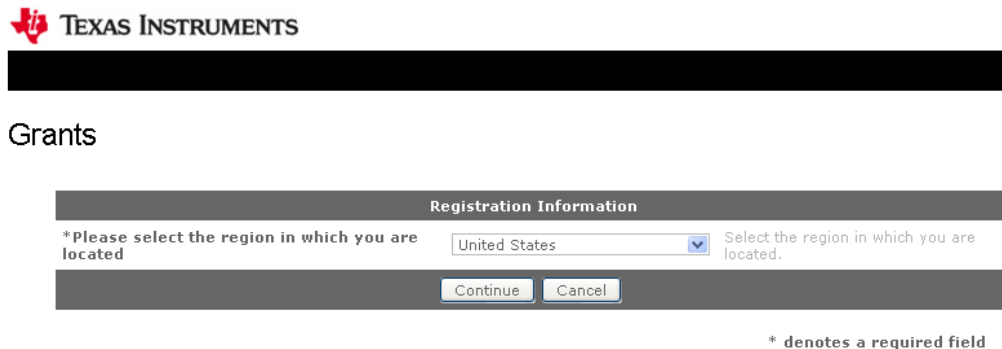

2] Clicking the "First Time User?" button takes you to the screen below where you select United States and click the "continue" button which takes you to the registration screen.

3] On the Registration Information screen, shown below, you must complete the fields. When you get to the" IRS AND/OR NCES INFORMATION" heading, you must complete either the Tax ID field or if you are with a K-12 school the School District ID and/or the School ID field(s).   DO NOT COMPLETE BOTH IRS and NCES areas.

Grants

Registration Information	
*First Name:	Enter your first name.
*Last Name:	Enter your last name.
*Telephone:	Enter your telephone number.
*E-mail Address:	Enter your e-mail address. You will need your e-mail address to log in.
*Password:	The password must be between 6 and 16 characters long and consist of letters, numbers or any of the following special characters: '@!#$-_'. The password "password" is not valid.
*Confirm Password:	
*Organization / School Name:	Enter the legal name of the organization for which you are applying.
*Zip / Postal Code:	Enter the organization's Zip/Postal Code.
IRS AND/OR NCES Information	
Tax ID (if applicable):	Enter the nine digit US Tax ID of the 501(c)(3) non-profit organization for which you are applying. If you do not know the organization's Tax ID, please contact the business office of the organization or call the IRS toll-free at 1-877-829-5500. If your organization is not located in the United States or otherwise does not have a US Tax ID number then leave this field empty.
School District ID (K-12 public schools and public school districts only):	For public schools, the District ID should be the first 7 digits of a 12 digit National Center for Education Statistics School ID. If you do not know the school's NCES information, please visit the NCES website.
School ID (K-12 public and private schools only):	For public schools, the School ID should be the last 5 digits of a 12 digit National Center for Education Statistics School ID. For private schools, the School ID should be the 8 digit NCES School ID. If you do not know the school's NCES information, please visit the NCES website.

Save   Cancel

* denotes a required field

4] Then click the "SAVE" button at the bottom.

- ➢ If one of the fields does not contain the correct data or you left a required field blank, you will receive an error message at the top of the screen telling you what field(s) you need to enter or modify.

- ➢ If all the fields contain the correct data, you will be taken to the Welcome page of the application. (See instructions starting on page 5).

NOTE: Clicking the "CANCEL" button will bring you back to the login page without saving any information entered.

B. ALREADY REGISTERED

1] If you have already registered your email address and password, on the first screen you must enter the email address and password you created when you registered. (See yellow highlighted area in screenshot below).

After I logged in from the Admin portal, I get this screen. Invitation code is not required.

2] Once you have entered the information, click the "LOGIN" button. (See green arrow in screenshot above). This will take you to the Welcome page of the application. (See instructions starting on page 5).

Note: The "Forgot your password?" link beneath the login area will ask for your email address and email mail you a temporary password if you have registered before. Otherwise it will let you know you have not yet registered.

WELCOME PAGE

Entering the correct login credentials will take you to the screen below.

TEXAS INSTRUMENTS

Grants

Edit Profile | Logout

Welcome, Susan Smith!

Proposal Welcome Text

Welcome, Susan Smith!

The organization you are currently associated with is cybergrants test.

If you work with multiple organizations, click here to add a new organization to your account.

The Apply Online grant application consists of three main sections, each of which must be completed for your proposal to be considered.

1. Contact information pertaining to your organization.
2. Basic information pertaining to your organization.
3. The proposal your organization is submitting for approval.

Once completed, all applications created in Apply Online are immediately submitted to Texas Instruments.

We recommend that you familiarize yourself with the online application before you begin.

- To create a new application, click the "Start a New Application" link at the bottom of this page. You may also save your applications now and return to work on them later.
- To continue work on an unsubmitted application, click the "Continue" link next to the application's Project Title.
- To view an application previously submitted to Texas Instruments, click the "View" link next to the appropriate Project Title.

TO RETURN DIRECTLY TO YOUR SAVED APPLICATION, type the following link in your browser's address bar to access the login screen directly:

www.cybergrants.com/TI/grant

You may wish to bookmark this link for future reference.

NEED HELP? If you have technical questions regarding this application, use the "Need Support" link located at the bottom of every page to contact our support team.

Each page will have a timeline like the one below to help you monitor your progress. The line and text will indicate your current position within the application process. If you have technical questions regarding this application, use the link located at the bottom of every page to contact our support team.

Welcome Page   Contact Information   Organization Information   Request Information
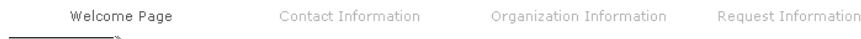
For a Brand New Application Use the link below.

» Start a New Application «

Need Support?

Texas Instruments - Grant application instructions for grantees

The link at the bottom is where you go to begin the application process. Simply click the "START A NEW APPLICATION" button to begin.

This will take you to the first section of the application called "CONTACT INFORMATION". Enter the information asked for into the fields. Any field that has a "**(required)**" at the end must be completed or the system will not allow you to go to the next section and an error message will appear near the top of the screen.

When all the required fields have been completed, simply press the "Save and Proceed" button to continue to the next section of the application, the Contact Summary page. Here you will need to select which contact to associate with this request. (See green arrow below). Then click the "Save and Proceed" button to move to the next page.

The next section is called the "ORGANIZATION INFORMATION" section. Some of the fields will be pre-populated with your organization information based on the information given during registration (if you have applied before, any changes made then will be reflected here). You may edit the information shown; any field name with an asterisk (*) after it must be completed in order to move to the next section of the application.

Grants

| Welcome Page | Contact Information | Organization Information | Organization Budget Information | Request Information |

* indicates required field

* Legal name	CYBERGRANTS TEST ORGANIZATIO
* Change legal name?	Has your organization recently changed its legal name?
	No ▾
Official name	Name associated with specific tax ID in the IRS business master file or name associated with school/school district in NCES data
	CYBERGRANTS TEST ORGANIZATION
Also know as (AKA)/doing business as (dba) name	
* Year founded	2005
* Mailing address	790 TURNPIKE STREET SUITE 300
* City	NORTH ANDOVER
* State	Massachusetts ▾
* Zip	01845-6129
* Has your organizations' address changed in the past year?	No ▾
* Telephone (including area code)	978-824-0323
Fax	
Website address	
Facebook page	
Twitter handle	

* Mission statement In 200 words or less, please describe your organizations mission, experience in the field, and accomplishments.

test

(1996 character(s) remaining)

* Is your organization a United Way service provider? Yes ▾

* CEO/Executive Director Sean Flanagan

* Number of full time staff 50

* Number of part time staff 0

* Number of volunteers 0

* Number of individuals served in the most recent fiscal year 123456

* Number of individuals expected to be served during the current fiscal year 123456

* Board of directors Please upload a document with a list of your board of directors

[Upload File]

• test_board_of_directors.xls (13.5 K), uploaded by Debbie Lawrence on 01/20/2012   [Delete File]

**W-9 Please upload a recent copy of your organization's W-9**

[Upload File]

[Save and Proceed]

Need Support?

The fields in the screenshot circled in red above are "Upload File" fields where you must attach a file that will provide more details for the question being asked.   Instructions on how to upload/attach a file to the application are shown over the next two pages.

Upload File Directions

Click the Upload File link, and a new window will open. **Steps A – D** are shown in screenshot below.
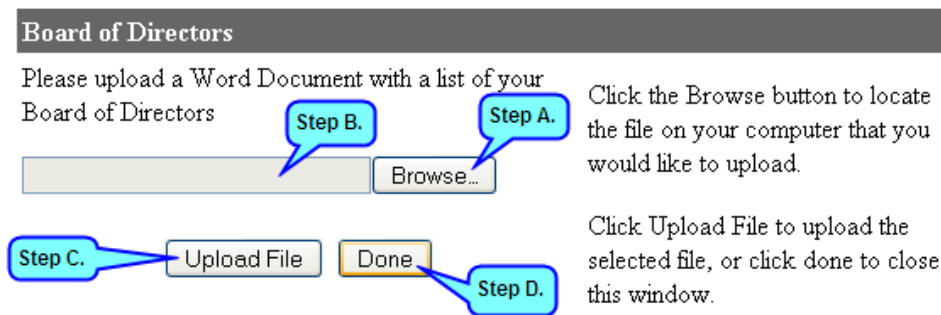
Step A. Click the browse button to locate the file on your computer that you want to attach to the application.

Step B. Once you find the file select it and the name will appear in the box next to the 'Browse' button.

Step C. Click the 'Upload File' button. The screen will refresh and a message will appear above the box telling you the file upload was successful (see green highlighted area in screenshot below) and the file name will then display beneath the 'Upload File' and 'Done' buttons. (See yellow highlighted area screenshot below).
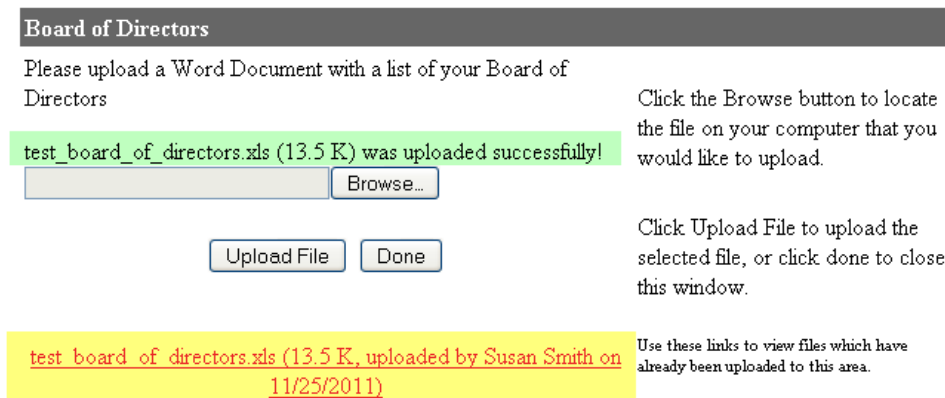
Step D. Click 'Done' button to return to the main screen. Screen will refresh and the file name will display in the field. See yellow areas in screenshot below.

When you have completed the fields and are ready to move on click the 'SAVE AND PROCEED' button at the bottom of the screen. This will take you to the "REQUEST INFORMATION" section shown over the next two screenshots.

Texas Instruments - Grant application instructions for grantees

Please be sure to read the instructions beneath each field name carefully so you enter the data in the correct format.

Welcome Page   Contact Information   Organization Information   Organization Budget Information   Request Information

* indicates required field

* Current fiscal year/projected fiscal year end date
(MM/DD/YYYY)

* Projected revenue

* Projected operating expenses

* Most recent fiscal year completed/fiscal year end date
(MM/DD/YYYY)

* Most recent fiscal year revenue

* Most recent fiscal year expenses

* Sources of revenue from the most recent fiscal year end (list 100 of total operating revenue)   Must add up to 100

%   Corporations

%   Foundations

%   Government

%   Individual

%   Other

If you selected other, please elaborate.

* Top five funders of your organization   Add to List

Remove from List

* Please attach a copy of your organizations most recent 990   Upload File

Save and Proceed

Need Support?

Click on Save and Proceed to move to the next page for your request.

Texas Instruments - Grant application instructions for grantees

In this section of the grant request you will be asked if the grant is an Education Grant or not. If it is NOT Education, the following fields will need to be completed. Skip to page 14 of these instructions if your's is an education request.

* An Event Honoring a Federal Official?	Will the contribution or disbursement be used to support (i) an event that honors or recognizes a U.S. federal official (such as Congressional Members and staff and Executive Branch officials and employees), or (ii) a meeting, conference, or similar event held by, or in the name of, such an official? No ▼
* Project title	test
* Grant purpose	Please provide a statement of your specific request (e.g., The purpose of the grant is to...). test (1997 character(s) remaining)
What are the projected outcomes for this grant? What metrics will be used to measure results?	(4000 character maximum)
* Is this request for an education project?	No ▼
* Geographic Area Served	----Dallas Area ▼
How many **individuals** will be impacted by this grant?	
* Requested Amount	If you are awarded $5,000 or more from Texas Instruments, you will be required to submit an impact report within 10 months that outlines your program outcomes in relation to your expected results.
* Total project budget	
* List the top five funders for this project	Add to List Remove from List

This screen continues on the next page of these instructions.

* Do you currently receive United Way funding for this project?

* How will you promote this grant if it is awarded? Provide information on how this grant will be promoted/publicized. Please note any external publicity of the grant must be coordinated with TI communications staff.

(2000 character maximum)

* Are there volunteer opportunities associated with this grant?

> If "yes", you will be asked to provide the names. If "no", you will be asked if there is a TI Champion and the names.

* TI board/committee members List any TI employees or retirees who serve on your board or on a committee.

Important Disclosure Information

NOTE: The following questions must be answered to be given full consideration for funding. Application will not be accepted otherwise.

* Entity named for a Federal Official? Will the contribution or disbursement be made to an entity that (i) is named for a Congressional Member or Staff, or (ii) is or was established, financed, maintained, or controlled by, a U.S. federal official (such as Congressional Members or staff and Executive Branch officials and employees)?

* Supporting a Presidential Foundation or Committee? Will the contribution be made to, or used to support, a Presidential Library Foundation or Presidential Inaugural Committee?

* Member of the U.S. House or the U.S. Senate serving on your board or is a founder of the organization?

* Designated by a Federal Official? Will the contribution or disbursement be made to an entity that was designated by a U.S. federal official (such as Congressional Members and staff and Executive Branch officials and employees)?

Save and Proceed

- If you answer "yes" to the question about volunteer opportunities, these additional fields will be displayed.

* Are there volunteer opportunities associated with this grant? Yes

1 If yes, please list opportunities.

Add to List

Remove from List

Volunteer coordinator name and contact information

Click on Save and Proceed to review your request. The instructions for Non-Education Grant requests continue on page 15.

If your request is for an Education project, the following fields will need to be completed.

* An Event Honoring a Federal Official?	Will the contribution or disbursement be used to support (i) an event that honors or recognizes a U.S. federal official (such as Congressional Members and staff and Executive Branch officials and employees), or (ii) a meeting, conference, or similar event held by, or in the name of, such an official? No ▾
* Project title	test
* Grant purpose	Please provide a statement of your specific request (e.g., The purpose of the grant is to...). test (1997 character(s) remaining)
What are the projected outcomes for this grant? What metrics will be used to measure results?	(4000 character maximum)
* Is this request for an education project?	Yes ▾
What is the estimated percent (%) of people ages 0-18 that will be served by this project?	
What is the estimated percent (%) of people ages 19-54 that will be served by this project?	
What is the estimated percent (%) of people ages 55-64 that will be served by this project?	
What is the estimated percent (%) of people ages 65+ that will be served by this project?	
What is the estimated percent (%) of males that will be served by this project?	
What is the estimated percent (%) of females that will be served by this project?	
What is the estimated percent (%) of Whites/Caucasians that will be served by this project?	

The screen for an Education grant request continues on the next page of these instructions.

What is the estimated percent (%) of Hispanics/Latinos that will be served by this project? [   ]

What is the estimated percent (%) of Blacks/African Americans that will be served by this project? [   ]

What is the estimated percent (%) of Asians that will be served by this project? [   ]

What is the estimated percent (%) of Native Hawaiian/Other Pacific Islanders that will be served by this project? [   ]

What is the estimated percent (%) of American Indians/Alaskan Natives that will be served by this project? [   ]

* Geographic Area Served [----Dallas Area ▼]

Grant subcategories (select all that apply)

- ☐ Post-secondary access
- ☐ STEM student programming
- ☐ Teacher effectiveness
- ☐ Technology
- ☐ Advocacy
- ☐ Other

How many **students** will be directly impacted by this grant? [   ]

How many **teachers** will be directly impacted by this grant? [   ]

How many **families** will be directly impacted by this grant? [   ]

How many **schools** will be directly impacted by this grant? [   ]

How many **school districts** will be directly impacted by this grant? [   ]

What school districts will this grant serve? [   ]

Does this grant focus on low/moderate income students? [▼]

Please provide a link to the school(s) demographic information (if applicable). If not applicable, please enter N/A.
[   ]

Is the program/project described in your grant proposal part of a local education partnership or collaboration? [▼]

* Requested Amount If you are awarded $5,000 or more from Texas Instruments, you will be required to submit an impact report within 10 months that outlines your program outcomes in relation to your expected results.
[   ]

* Total project budget [   ]

The screen for an Education grant request continues on the next page of these instructions.

* List the top five funders for this project

[ ] [Add to List]

[Remove from List]

* Do you currently receive United Way funding for this project? [▼]

* How will you promote this grant if it is awarded? Provide information on how this grant will be promoted/publicized. Please note any external publicity of the grant must be coordinated with TI communications staff.

[text area ▲▼]

(2000 character maximum)

* Are there volunteer opportunities associated with this grant? [▼]

If "yes", you will be asked to provide the names. If "no", you will be asked if there is a TI Champion and the names.

* TI board/committee members List any TI employees or retirees who serve on your board or on a committee.
[▼]

Important Disclosure Information

NOTE: The following questions must be answered to be given full consideration for funding. Application will not be accepted otherwise.

* Entity named for a Federal Official? Will the contribution or disbursement be made to an entity that (i) is named for a Congressional Member or Staff, or (ii) is or was established, financed, maintained, or controlled by, a U.S. federal official (such as Congressional Members or staff and Executive Branch officials and employees)?
[▼]

* Supporting a Presidential Foundation or Committee? Will the contribution be made to, or used to support, a Presidential Library Foundation or Presidential Inaugural Committee?
[▼]

* Member of the U.S. House or the U.S. Senate serving on your board or is a founder of the organization? [▼]

* Designated by a Federal Official? Will the contribution or disbursement be made to an entity that was designated by a U.S. federal official (such as Congressional Members and staff and Executive Branch officials and employees)?
[▼]

[Save and Proceed]

- If you answer "yes" to the question about volunteer opportunities, these additional fields will be displayed.

* Are there volunteer opportunities associated with this grant? [Yes ▼]

1 If yes, please list opportunities.
[ ] [Add to List]

[Remove from List]

Volunteer coordinator name and contact information [ ]

Once you have completed all the questions click the 'SAVE AND PROCEED' button at the bottom of the screen to move to the next section called 'REVIEW YOUR APPLICATION'.

Because you may use the timeline shown at the top of every screen to jump between screens and answer the questions, the system double checks all required fields before allowing you to get to the review screen. Two things can happen depending upon whether or not all required fields were completed. The two scenarios are described below.

❖ **IF REQUIRED FIELDS NOT COMPLETED**

If there are required fields that have not been filled in, you will be shown a screen that lists the section name(s) and the field name(s) that must be completed.

Clicking on the section name located in either the timeline (at top) or in the message area (at bottom) will take you back to that screen where you must complete the required field(s). Then you will need to either click save and proceed on each screen until you get to the review screen or you may click on the last section in the timeline at the top of the screen and then click Save and Proceed in that last section which will take you back to the Review screen.

In the example below, one field that was not completed called "Telephone", located in the section called "Organization Information". (See blue arrows in screenshot below which show the two areas where you may click to go back to the section to complete the field).
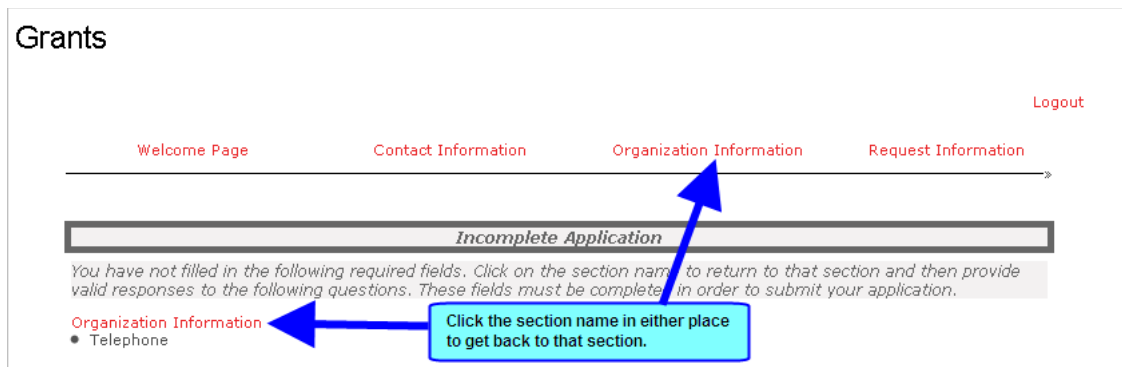
❖ **IF ALL REQUIRED FIELDS COMPLETED**

If all the required fields are complete, you will be taken directly to the 'REVIEW YOUR APPLICATION' screen shown over the next two screenshots.

TEXAS INSTRUMENTS

Grants

Review Your Application

Please review your proposal information. If you are not ready to submit your proposal at this time, click the "Save Only" button. The proposal will then be available to edit from the Welcome page. Clicking the Submit button will immediately send the application to Texas Instruments and you will then be unable to perform further editing.

Contact Information	
Salutation (required)	Ms.
First Name (required)	Susan
Last Name (required)	Smith
Suffix	
Title (required)	Executive Director
Telephone (required)	123-456-7890
E-mail Address (required)	ssmith8@cyberg.com
Organization Information	
Legal Name (required)	Test Organization
Has your organizations's legal name changed in the past year? (required)	No
Address (required)	123 Main St.
City (required)	Andover
State (required)	Massachusetts
Zip (required)	01810
Has your organizations's address changed in the past year? (required)	No
Telephone (required)	123-456-7890
Fax	
Website Address	
Organization Description (required)	Our mission is...
CEO/Executive Director (required)	Susan Smith

Board of Directors

test_board_of_directors.xls (13.5 K, uploaded by Susan Smith on 11/25/2011)

Request Information	
Project Title (required)	test grant application
Project Description (required)	This project will ...
Measurable Outcomes (required)	We will measure our success by ...
Requested Amount (required)	$1.11
Lobbying amount *(if applicable)* **(required)**	$0.00
Benefits (required)	Yes
Please describe benefits	The benfits to TI will be
Volunteer Opportunities (required)	No
Please Describe Volunteer Opportunities	
TI Board Members (required)	No
List TI Board Members	
Name of TI Champion(s) if applicable	Henry Lawton

Important Disclosure Information

NOTE: The following questions must be answered to be given full consideration for funding. Application will not be accepted otherwise.

Entity named for a Federal Official? (required)	No
If yes, please list name, title, and affiliation with organization.	
Supporting a Presidential Foundation or Committee? (required)	No
If yes, please list the name of Foundation or Committee	
Designated by a Federal Official? (required)	No
If yes, please list name, title, affiliation with organization, and circumstances of designated contribution.	
An Event Honoring a Federal Official? (required)	No
If yes, please list name, title, affiliation with organization, and brief description of recognition.	

Submit   Save Only

Need Support?

The Review Your Application screen shows all the answers for the entire application in read-only format so you may double check them. (All questions for both Education and non-Education grants are displayed.) You only need to be concerned with the questions and answers related to your request.) If you wish to modify any answer, simply click on the section heading (i.e. ORGANIZATION INFORMATION , REQUEST INFORMATION) for that question, and the system will take you back to that screen where you can make your changes and save them. Then you will need to either click 'SAVE' and proceed on each screen until you get to the review screen or you may click on the last section in the timeline at the top of the screen and then click 'SAVE and PROCEED' which will take you back to the Review screen.

At the bottom of the review screen are two buttons, 'SUBMIT' and 'SAVE ONLY'. Each is described below.

SUBMIT – clicking this will send your application to Texas Instruments for review. When you click the submit button, the pop up shown below will display to let you know you will not be able to modify the application if you continue with the submission.
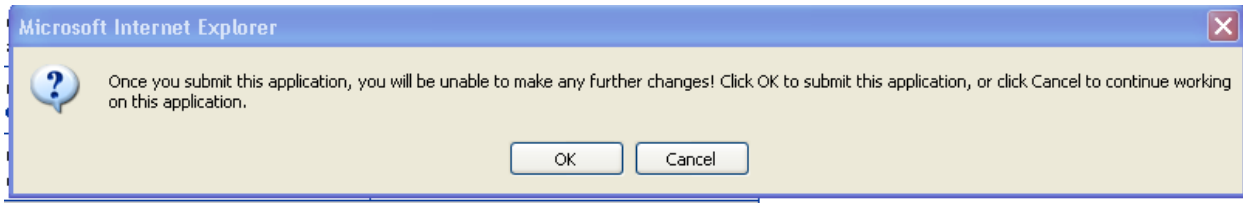
Clicking the "OK" button submits your application. The "CANCEL" button takes you back to the review screen without submitting the application to Texas Instruments.

Once you have submitted the application, the screen will refresh, and you will see a message displayed at the top. (See green highlighted area in screenshot below).
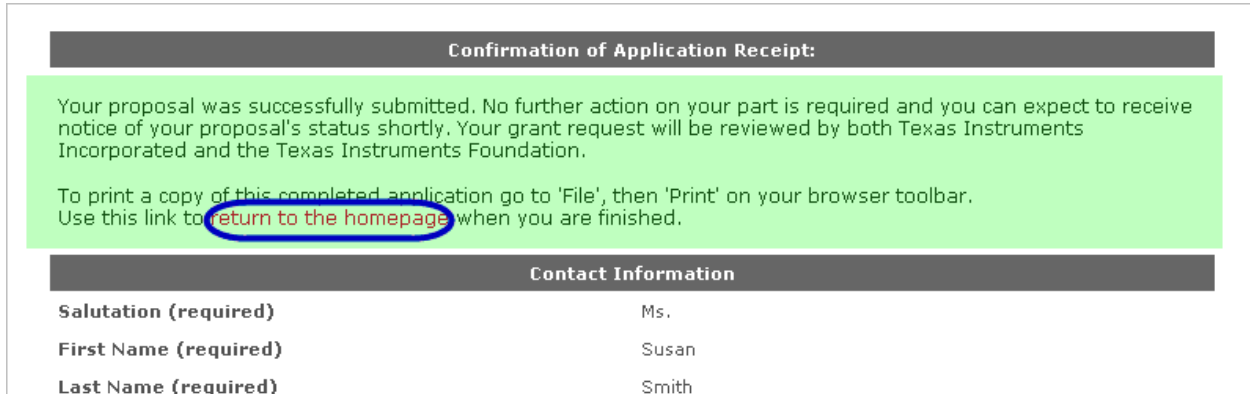
You may print this confirmation page for your records by going to the browser's menu bar and printing (i.e. in Internet Explorer & Firefox you would go to 'File' then the 'Print' option beneath it).

SAVE ONLY – this does NOT submit the application to Texas Instruments but allows you to return later to submit the application or make changes before submission.

If you click the save only button, you are taken back to the Welcome page where you will now see the application you have worked on under the heading called "Applications Requiring Action". When you want to continue working on the application or you want to submit it, you must click the 'Continue' link to the left of the project title (see green circle in screenshot below). You will then be able to navigate through the screens via the timeline or by clicking Save and Proceed at the bottom of each screen.

Texas Instruments - Grant application instructions for grantees

NOTE: To see or print out an application that you have submitted, go to the Welcome page and near the bottom under the section called "Submitted Applications" you will see the application you have submitted to Texas Instruments. To see the details or print out a copy of the completed application click on the 'View' link (see blue circle in screenshot above). This will take you to a read-only screen just like the Review application page where you may print by going to the browser's menu bar and printing (i.e. in Internet Explorer you would go to 'File' then the 'Print' option beneath it).

To Work on an Application that was started but <u>Not</u> Submitted:

Next time you want to work on an application you will use the same URL to get to the login screen. There you will enter your login information and invitation code and click the login button.

On the Welcome page you may work on an application that you started previously but have not yet submitted by going to the portlet with the heading of "APPLICATIONS REQUIRING ACTION " and clicking the 'Continue'' link next to the application you wish to complete.   Once in the application you will go from screen to screen and submit as described previously in this document.