

<u>Portland Children's Levy – WebGrants Application Guide</u>

How to Use this Guide

This guide is meant to help everyone submit their Portland Children's Levy Small Grants Fund application in WebGrants as smoothly as possible. If you are new to using a grant portal, you may want to review the guide step by step and follow along while you work in the WebGrants system. If you are very comfortable using grant portal software, we recommend you skim this guide, carefully review areas with this exclamation point icon shown in the right-hand margin, and review the Troubleshooting section at the end of the guide.



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What is WebGrants?

WebGrants is the grants management system for the City of Portland. To apply for a Portland Children's Levy grant, you will need to register in WebGrants and submit your application through the system.

WebGrants will track your application and all related documents for your organization.

Registration

Multiple people can register under your organization and work on the same grant application in WebGrants. <u>Important: New users, please register as a WebGrants user right away.</u> For help registering, see our <u>WebGrants registration guide on the Grant Applications webpage</u>. If you have an existing WebGrants account, you will not need to register again. The deadline to register for this PCL grant opportunity is **November 14, 2025**.



If you need an Americans with Disabilities Act (ADA) accommodation or are having trouble with WebGrants, please reach out to info@portlandchildrenslevy.org with "WebGrants" in the subject line. PCL staff will be happy to help.

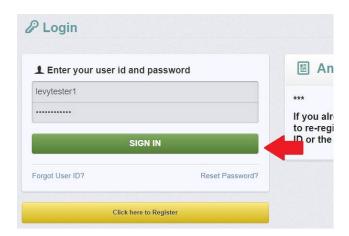
Preparing to Apply

We highly recommend you review all the application questions before beginning your application in WebGrants. The full application includes background information and instructions, application questions, budget guidance, and scoring criteria. You can find the application and instructions here:

portlandchildrenslevy.org/grants/2025-26-small-grants-overview

How to Log In

Once you are registered, go to https://cityofportlandgrants.net/ on a computer or tablet. WebGrants does not work well on a phone. If you don't have the link handy, just google "City of Portland Webgrants." Once there, enter your user ID and password, and click the green "sign in" button.

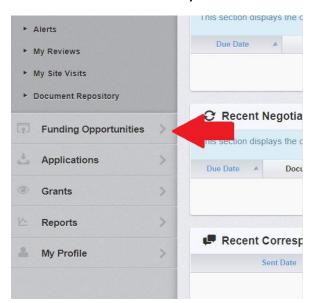


You get your User ID and Password via email when you register. If you forgot either of them, click on the blue links below the sign in button and follow the steps to recover them.

Select a Funding Opportunity

Once you are logged in, you will see all funding opportunities offered by the City of Portland. Make sure you select the one titled "PCL Small Grants Fund."



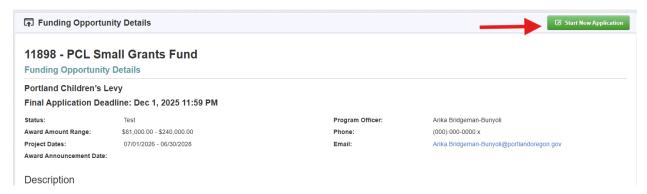


When you click on the Funding Opportunity you want to apply for, your application will "live" under this funding opportunity.



How to Start an Application

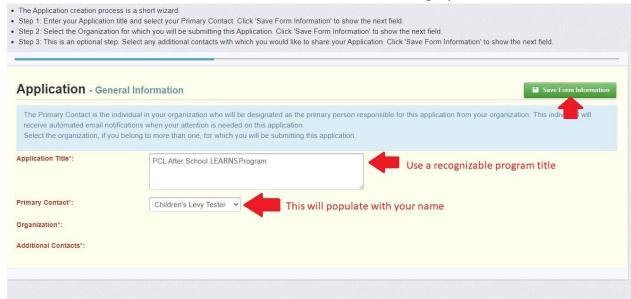
To start an application, click on the green "start new application" button on the right-hand side of the screen in the funding opportunity.



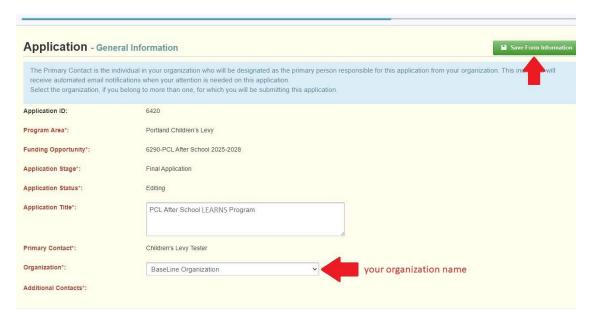
You will be taken to the "Application Creation Wizard". This form is unusual, because you will have to click the "save form information" button multiple times. Under "Application Title," enter the title of your application, which should include the name of your program.

Under Primary Contact, your name should appear as the default in the drop-down menu. This is the person who will get the email notifications from the WebGrants system (if you need to change the primary contact later in the process, you can).

Click "Save Form Information" to save this info and bring up the next field to edit.

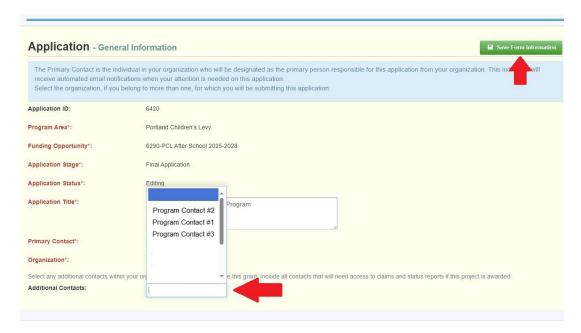


After you click "save form information," the organization field will pop up. It will auto-populate your organization name in the drop-down menu. Click "save form information" again to bring up the last field to edit.



After you click save, the optional "additional contacts" field will pop up. The drop-down menu will auto-fill with every individual who is registered in WebGrants and is associated with your organization. You will want to select everyone who will want to edit the application or upload documents. If someone isn't registered yet,

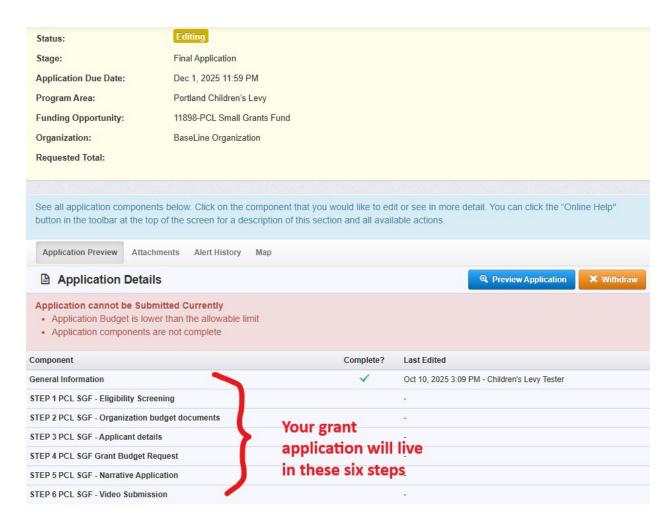
you can add their name later. Then click "save form information" to complete this section.



Once this section is done, you have created the application in the system to work in. You will automatically be taken to the application view. Here you have a summary view of your application – the title of your application will be at the top, and the components of the application you need to complete will be listed as steps 1-6 toward the bottom.

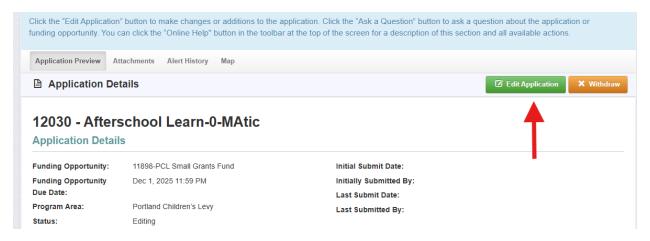


(see the screenshot image on the next page)



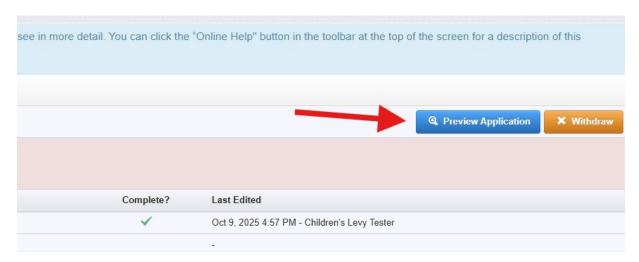
How to Navigate to Your Application

Once the application is created, there are several ways to open it. We recommend clicking on the Applications tab on the left-hand navigation bar, and then clicking on the application record to open it. To enter answers to the application questions, click "edit application" in the top right corner.

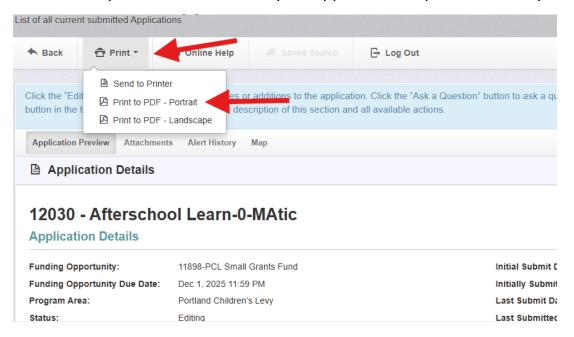


How to Preview the Application Questions

When you are in the application view screen, you can click the blue "Preview Application" button to see all the application questions that are listed in WebGrants.



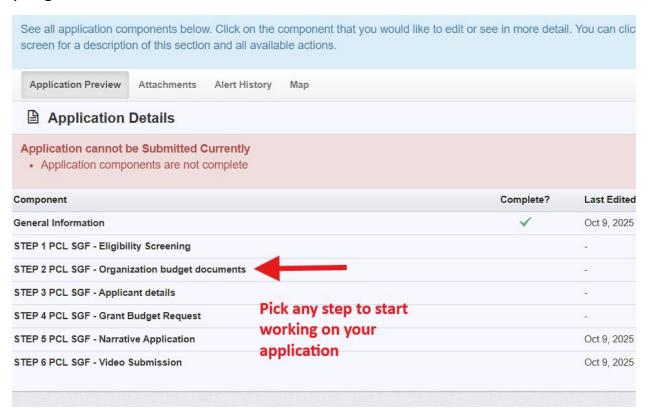
In the preview screen, you can print your application by clicking on the grey "print" tab up toward the top of the page, and it will give you drop-down options to send it to a printer or convert it to a .pdf. This is a good way to review the WebGrants questions or look over your application responses before you submit.



How to complete your application

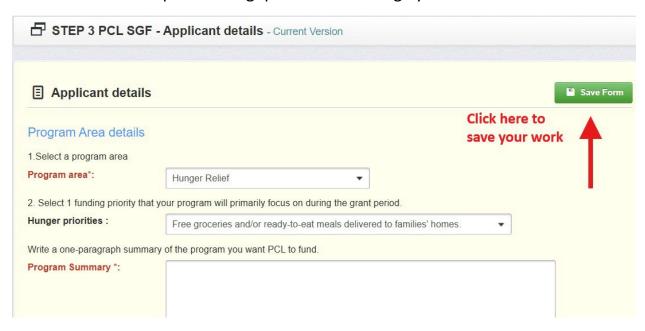
There are six sections to the application – steps 1-6. Steps 1-4 have questions about program eligibility, your service population, program model, and budget summary. Step 5 is where you upload your grant narrative. You can find the <u>narrative template on PCL's website</u>. Step 6 is where you enter the link to your video.

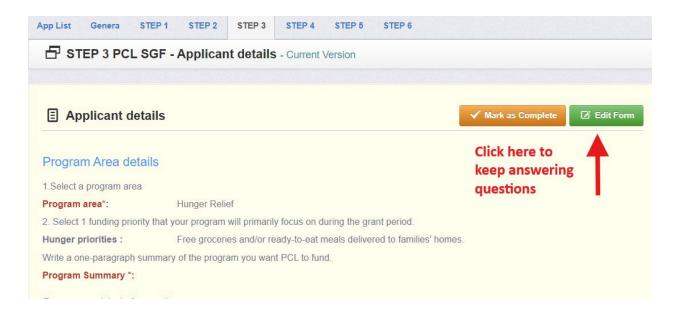
To start answering questions, click on the step you want to work on in the application view. You can work on them in any order and save your progress as you go.



Saving and Editing

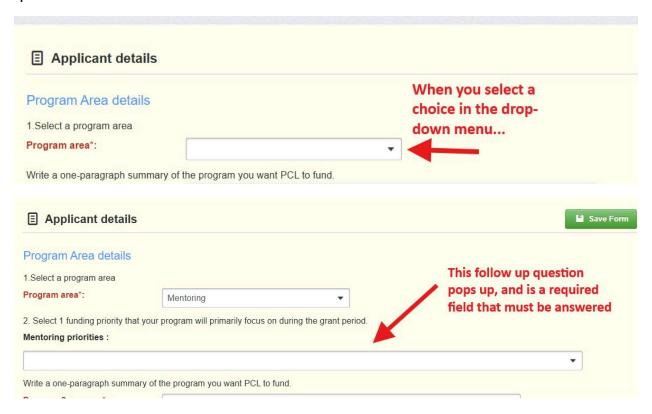
When you click on a Step, you will be able to enter information. Save your work at any time by clicking the green "save form" button in the upper right. After you click "save form", you will need to click the green "edit form" button to go back into the form to keep answering questions or change your answers.





Required Questions

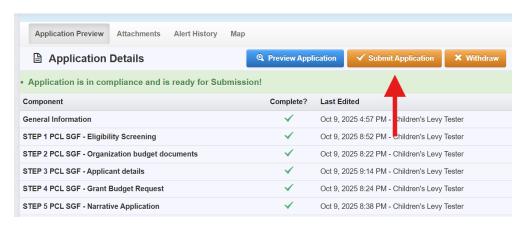
All fields with a red label are required and must be filled out before you can mark a step as complete. A few questions "pop up" based on your answers to previous questions.



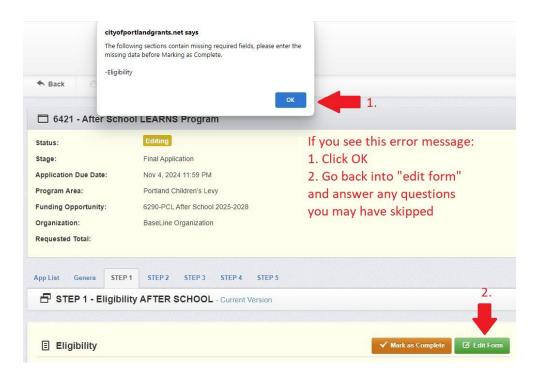
Marking Steps as Complete

You must mark each step complete before you can submit your application. If you have filled out all the required questions in a step, you click the save button and then click the orange "Mark as Complete" button.

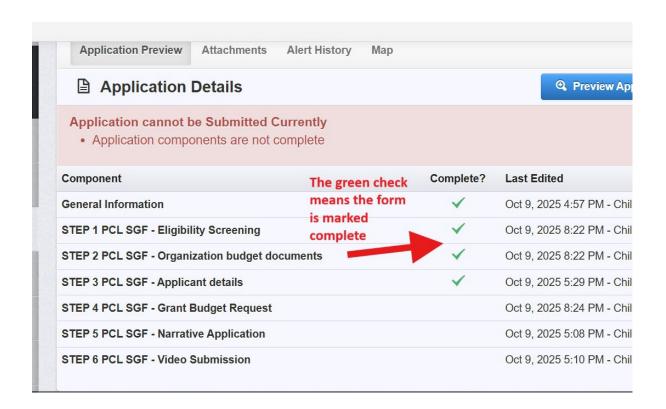




If you click the "Mark as Complete" button but you have not filled out all the required questions, you will get a pop-up error message. The error message will show the name of the Step form, but not the name of the question that is missing. Review the Step form to complete any questions that may be blank.



When you successfully mark a step as complete, you will be taken back to the application summary view, where you will see a green check mark that shows the step has been completed (see the screenshot on the next page)



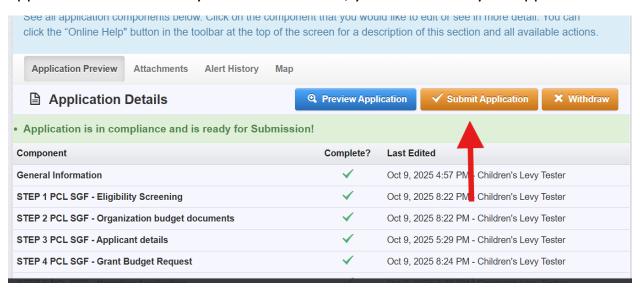
Note: after you mark a step as complete, you can still make changes in it. You click on the step and click "edit form" and make whatever changes you need, just like before. Once you have marked a step as complete, however, it stays marked as complete regardless of any changes you make.



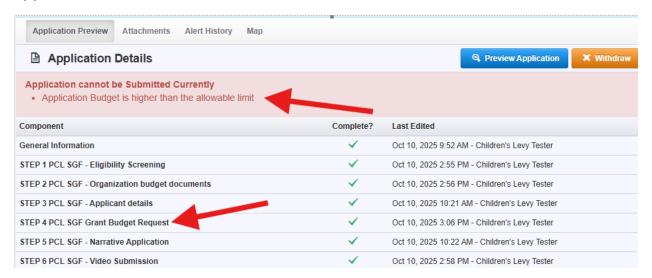
Submitting Your Application

Once all five steps are filled out, documents are uploaded, and the steps are all marked as complete, the orange "submit application" button will appear in the application view screen. You <u>MUST</u> click on this button to submit your final application to PCL. Once you have submitted, you cannot edit your application.





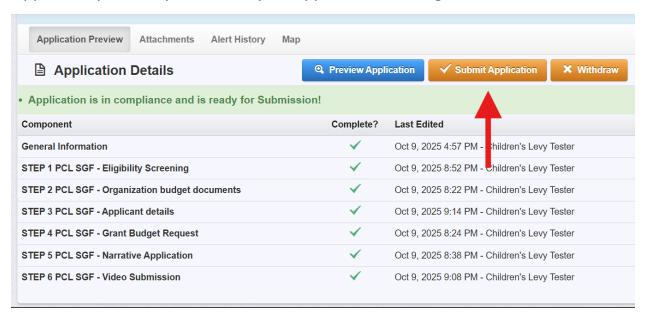
Note: if you see a red message on this screen that says "application budget is higher (or lower) than the allowable limit", this means that your answer to question 1 on Step 4 – Grant Budget Request is outside of the range of \$81,000-\$240,000. Adjust your budget request, and the "submit application" button will appear.



You will get a pop-up message to confirm you wish to submit the grant. Click "Submit".



You can confirm your application is submitted by navigating back to the Funding Opportunity, where you will see your application with a green "submitted" status.

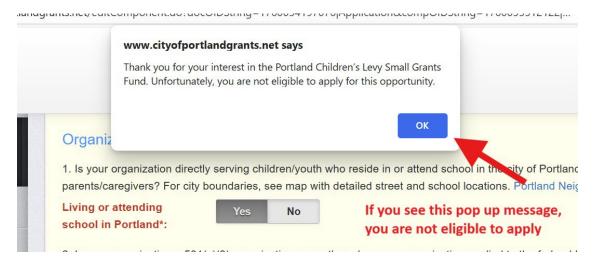


Tips for completing forms in Steps 1-6

Use the brief tips below to help you complete the fields in the forms for Steps 1 – 6 of the application. You can also refer to pages 6-7 of the Small Grants Application published on PCL's website: portlandchildrenslevy.org/grants/2025-26-small-grants-overview/grant-applications

Step 1 – Eligibility

Answer the yes or no eligibility questions. If you answer "yes" to question number four, an additional question will pop up asking for details about your fiscal sponsor. If you answer no to questions 1-3, you will receive a pop-up message telling you that your organization is not eligible.

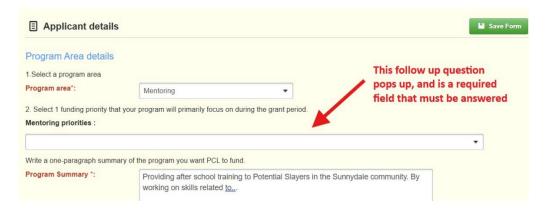


Step 2 – Organization budget details

You are required to upload a budget in question 1. Questions 2 and 3 are only required if you are applying with a fiscal sponsor.

Step 3 – Applicant Details

After you select a program area, a follow-up question will pop-up with a drop-down menu. This question is required. The demographic questions are all optional.



Step 4 – Grant Budget Request

The budget form will accept numbers either as integers (34152) or with currency formatting (\$34,152.00)

Step 5 – Narrative upload

In this step, upload the narrative file. Make sure you are using the PCL template for your narrative document, and that it meets font size and page length requirements. Upload the file as a .pdf or a Microsoft word document (.doc or .docx).

Step 6 – Video Submission

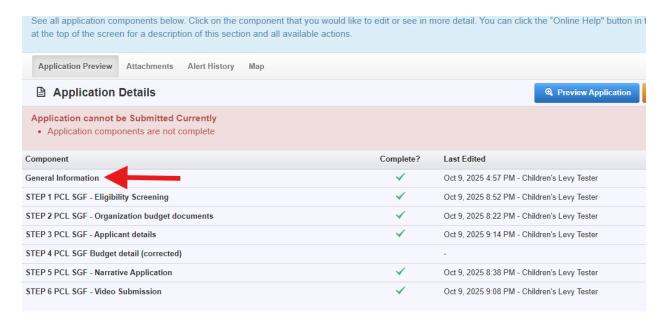
In this step, the link to the video is required. If you select "yes" to the translation question, a follow-up question will pop-up asking which languages are spoken in the video.

Questions, ADA Accommodations & Troubleshooting

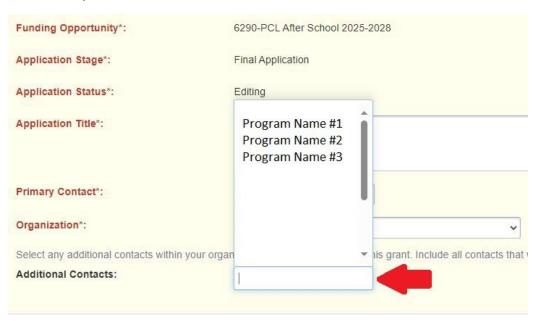
If you need an Americans with Disabilities Act (ADA) accommodation or are having trouble with WebGrants, please reach out to info@portlandchildrenslevy.org with "WebGrants" in the subject line. PCL staff will be happy to help.

I need to add another contact so they can have access to the WebGrants application. What do I do?

- 1) Have your colleague register in WebGrants.
- 2) Once their registration is approved by PCL staff, they will get their user ID and password to log on via email.
- 3) Once they get their user ID and password, go into the application summary page and click on the "general information" section.



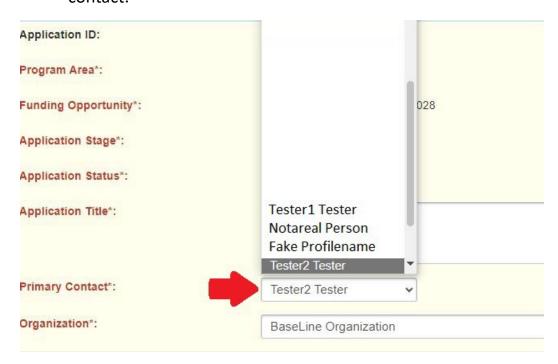
4) Click on the "Additional Contacts" field and add the person's name from the drop-down menu



5) Click "save form information". Your colleague should now be able to access the grant application.

I need to change the primary contact, so someone else gets the WebGrants system alerts. How do I do that?

- 1) Follow the steps 1-4 from the question above to get your colleague registered in WebGrants and click on the "general information" section of the application.
- 2) Click on the "primary contact" drop-down menu, and choose the name of the person affiliated with your organization who needs to be the primary contact.



I marked one of my grant forms as "complete," but then I needed to change something. How do I mark it as "complete" again? I don't see the orange button anymore!

Once you mark a step as complete, it stays marked as "complete" in the system, even if you change or delete information. After you make changes to a completed step and click save, the orange "mark as complete" button will not be available to click. You can confirm this by going to the main application summary view, where it shows all the steps and shows the green checks for each section that is marked as complete.

I am not getting WebGrants-related emails confirming anything (registration or grant submission). What do I do?

- 1) Make sure you check your spam folder for any WebGrants emails.
- 2) Add <u>cityofportland@mail.webgrantscloud.com</u> as a safe sender in your email filter settings.
- 3) If this does not work, contact PCL staff at info@portlandchildrenslevy.org for assistance with "WebGrants help" in the subject line within 48 hours of your submission.

I tried to mark a form as complete, but I got an error message. All the red fields are filled out. What do I do?

Sometimes there are follow-up questions that pop up which are required. These questions do not have red labels, so they may not be as easy to see at first. Return to the step editing function and fill out any blank fields, and then mark the step as complete.

I was working in the budget form, and I entered some numbers and clicked save, and then I got a very long and confusing error message – what happened?

If you enter two decimal points into one field (for example, \$2500.00.0) the system experiences an error that takes you to an intimidating-looking error screen. Click the back button on your browser, check your numbers, and remove any extra decimal points.

<u>I want to read through my entire application before I click submit. How do I do that?</u>

See "how to preview the application questions" on page 8 and follow those steps to "print" your application to a .pdf file. It will print the application questions along with your answers.