GRANTS MANAGEMENT SOLUTION APPLICANT GUIDE

Contents

Access the Grants Management Solution

Access to the **Grants Management Solution** will begin from the [NeoGenomics Corporate Stewardship](#) website. A website link will be available to Applicants to navigate from the organization's website to the Grants Management Solution portal.

The **Grants Management Solution** portal will be the access point to all applicable types of requests.
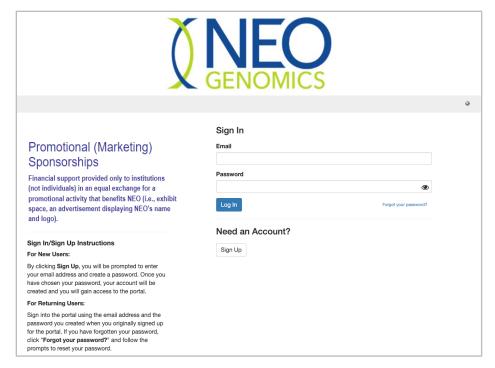

Grants Management Solutions portal home page

Register with the Grants Management Solution

Applicants will be taken to the Login screen which will provide instructions on the left-hand side. If the user is already registered, they may simply log in via their email and password. Password reset is already built in. If the user requires to register, they will click the **Sign Up** button and complete the sign up form.

GMS login screen

GMS Sign up screen

New Applicant Profile Setup

Once the Applicant has registered for the first time, they will be requested to complete their user profile and will be able to access the **Dashboard**.

The system will not let an applicant proceed to create a new request unless they have completed their profile.

Create a Profile option

Access Other Grant Request Dashboards

Navigation to other request portals will be displayed on the **Dashboard** (if applicable). Once registered, the user can pass between dashboards easily. They simply click on the other grant type to be taken to that dashboard.

A verification to continue to the dashboard will be displayed, once user selects to continue, they will be taken to the other grant request dashboard.

Accessing a different request dashboard

Accessing a different request dashboard

Applicant Dashboard and Request Tracking

The applicant dashboard will allow an applicant to do the following:

- Gear icon (upper-right corner) – access a general help page and logout of system.
- **Profile Edit** – update profile information.
- **Add Another** button – create a new grant request.
- View and track previously submitted requests:
  - Statuses will be displayed for each request.
  - Requests that are returned to Applicant for more information will indicate in the status bar.
  - If a request is approved, but close out documentation is required after the event, the status will remain in the **pending close out** status until final documentation is provided.

Charitable Donation Request Dashboard

Create a New Request

Applicants can start a new request by clicking the **Add Another** button. This will open a new grant request form. Forms will vary based on the type of grant request.

Applicants can save draft requests and submit later. Once they have completed all required sections, the green **Submit** button will be available. Upon submitting the request, GMS will notify the NeoGenomics grants committee and begin the review process.

New Promotional (Marketing) Sponsorship request page

Example - Charitable Donation Information

Applicants will need to fill out the information required in the Charitable Donation Information and the Requestor Information.

Any items marked with a red asterisk are required. In the event that a required field is not applicable please enter "N/A". Required documentation must be uploaded. Any type of document (pdf, ppt, gif, doc, etc) is allowed but it cannot exceed 1,000 MB (***please note for educational grant requests all documents must be submitted in PDF Form***).

For each section (Charitable Donation Information & Requestor Information) fill out, select "Mark Complete" or to save without completing select "Save Draft.
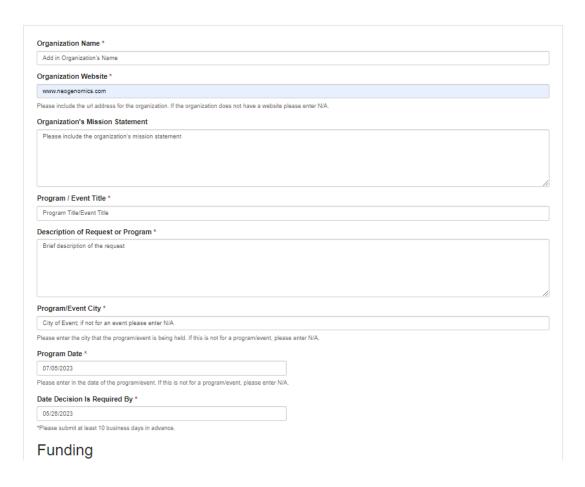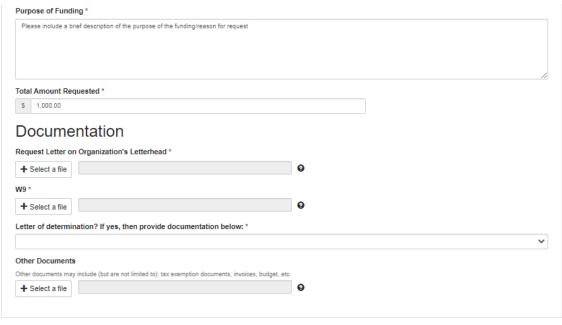
Charitable Donation Information ▾

Please complete all required fields.

You can save as a draft and return later to complete by clicking "Save Draft" at the bottom of the page.

When you are ready to submit this step, please click the blue "Save" button at the bottom of the page.

Organization Name *

> Add in Organization's Name

Organization Website *

> www.neogenomics.com

Please include the url address for the organization. If the organization does not have a website please enter N/A.

Organization's Mission Statement

> Please include the organization's mission statement

Program / Event Title *

> Program Title/Event Title

Description of Request or Program *

> Brief description of the request

Program/Event City *

> City of Event; if not for an event please enter N/A

Please enter the city that the program/event is being held. If this is not for a program/event, please enter N/A.

Program Date *

> 07/05/2023

Please enter in the date of the program/event. If this is not for a program/event, please enter N/A.

Date Decision Is Required By *

> 05/26/2023

*Please submit at least 10 business days in advance.

Funding

Purpose of Funding *

> Please include a brief description of the purpose of the funding/reason for request

Total Amount Requested *

> $ | 1,000.00

Documentation

Request Letter on Organization's Letterhead *

+ Select a file | | ❓

W9 *

+ Select a file | | ❓

Letter of determination? If yes, then provide documentation below: *

> ⌄

Other Documents

Other documents may include (but are not limited to): tax exemption documents, invoices, budget, etc.

+ Select a file | | ❓

Save Draft   **Mark Complete**   Close

Requestor Information ▾

Last saved at 11:51:30 AM

Legal Entity Information

Legal Entity Name *

[Enter the Entity's Legal Name]

Address (Street 1) *

[Address 1]

Address (Street 2)

[Address 2 (if Applicable)]

City *

[City]

Country

[United States ▾]

State *

[California ▾]

Postal / Zip Code *

[5 digit zip code]

Requestor Information

Requestor First Name *

[Requestor's First Name]

Requestor Last Name *

[Requestor's Last Name]

Requestor Title

[ ]

Phone Number (include area code) *

[Phone number)]

Email Address *

[email address please note that this is where all emails related to this request will go. test@neogenomics.com]

Is the contact the same as the requstor? *

[Yes ▾]

Last saved at 11:51:30 AM

Submitting a Request

Once all information has been marked complete you can submit the application request.

You can check the status of your grant request by going back to the portal.