Funding Hub
User Guide

This document will give you an overview of our Funding Hub website and the process you can expect to go through to complete and submit your online funding application or a report.

To access the Funding Hub you require a Username and Password to Log-in.

Visit www.foundationnorth.org.nz/funding/log-in and select the option that best describes you. The page has two options:

1. First time using the Funding Hub?
2. Returning user of the Funding Hub?

1. First time using the Funding Hub?

If you are new to the Funding Hub, Click here here to be taken to an Eligibility Quiz which you must complete and submit.

Note: Before completing the Eligibility Quiz, ensure you have read the webpages about what we do and don't fund. Also make sure you have read about eligibility on our Who Can Apply webpage.

If eligible; you will immediately proceed to the registration form which you must complete and submit. It may take up to three working days to process your registration and once approved, you will receive an email with your unique username and password; and information on how to log-in and use the Funding Hub.

2. Returning user of the Funding Hub?

If you are a returning user of the Funding Hub, Click here to be taken to the Welcome Page of the Funding Hub.

Log-in using your unique Username and Password credentials. If you can't remember your password, click on 'Reset or create password' for a new one.
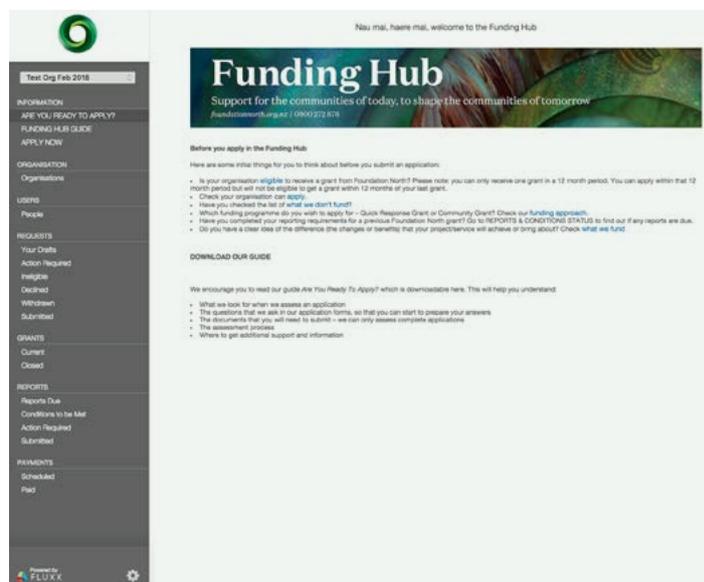
Note: We no longer accept an email address as a Username. If you don't know or can't remember your username, contact us on 0800 272 878, option 2.

Once you are logged in you will be taken to the landing page of the Funding Hub.

The Information section contains:
- All you need to know to make a complete application
- How to navigate in the Hub
- Our application forms

In the Funding Hub you can:
- Submit a grant application (request)
- Track the progress of an application
- Find out when reports are due; complete and submit them
- Keep an eye on your payments
- Update your organisation details
- Communicate with your Foundation North funding advisor

Top Tips
1. Using Google Chrome as your internet browser is recommended.

2. Save your work in the Hub regularly, as forms do not auto-save.

3. There is no 'Back' button in the application form. DO NOT use the 'Back' key on your keyboard as this will eject you from the Hub. Click on 'Save' then return to make changes by clicking on 'Your Drafts'.

4. Only 'Submit' when your application is complete. Once you Submit, you will no longer be able to edit.

5. Remember to scroll to the bottom to see the full menu!
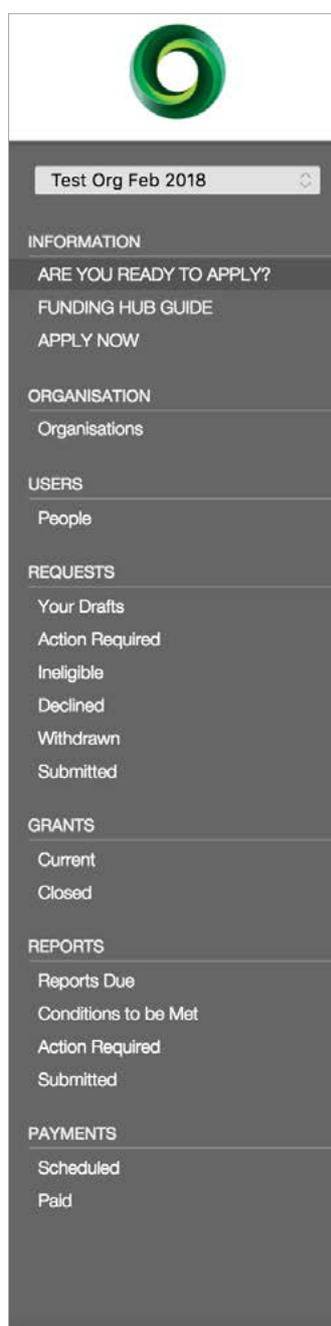
Symbols in the Funding Hub Menu

Indicates a notification is waiting for your attention.

Click the cog at the bottom right of the Menu to log-out of the Hub or 'Change your password'.

Navigating in the Funding Hub

Cards in the Hub: Sections within the Hub (arranged on the left-hand menu) are called Cards.

A.
Organisation/s Linked to Your Profile

This section will display all the organisation's you are linked to. If you are linked to multiple organisations, this section will say 'All'.

Click on 'All' to display all organisation name/s.

Click on the applicable organisation you wish to work on or apply for funding.

Note: You can only work on one application for one organisation at a time.

If you are no longer connected to an organisation displayed, send an email to onlinesupport@foundationnorth.org.nz with the name the applicable organisation/s you want removed from your profile.

B.
Organisations

This card contains information about your organisation. It is important that the Organisation Information and Organisation Profile sections are updated regularly to ensure we have accurate and up-to-date information about your organisation.

Note: The information contained in both sections is read in conjunction with your application.

A list of People linked to your organisation can be found in the Organisation Profile section. The Moderator is responsible for ensuring this list is kept up to date.

If you wish to archive anyone from this list, please send an email request to onlinesupport@foundationnorth.org.nz and remember to include the first and last name of the person/s to be archived. 'New' people can be added by asking them to register to the Funding Hub.

If you are part of more than one organisation, a box at the top left lets you select an organisation and the details associated with this organisation.

C.
Requests

Your Drafts - this card holds all saved draft applications.

Action Required - this card holds any applications that have been 'sent back to applicant' from Foundation North staff because more information is required. If an application has been sent back to you; all contacts noted on the application will receive an email advising to log-in to the Hub to edit your application.

Details of the information or updates required will be on the application form.

Submitted - applications that have been submitted and are being assessed by Foundation North staff are in this card.

Ineligible - applications that have been made ineligible are in this card.

Declined - applications that have been declined are in this card.

Withdrawn - applications that have been withdrawn are in this card. You will also be able to 'copy & paste' information to a new application should you wish to apply for the same thing next time.

Test Org Feb 2018 ⬍ **A**

Test Org Feb 2018
Org ID: 12962
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Auckland 1009

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D.
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Current – this card holds all approved applications (grants). You can view documents associated with an application. You will also be able to 'copy & paste' information to a new application should you wish to apply for the same thing next time.

Closed – this card holds all 'closed' grants. A 'closed' status indicates that final impact report has been submitted and approved for the applicable grant. You can view documents associated with this grant and 'copy & paste' information to a new application should you wish to apply for the same thing next time.

E.
Reports

Reports Due – reports that are due, along with their due dates, are in this card.

These may include impact reports, progress reports or milestone reports. You can submit these here via the Hub.

Conditions To Be Met - any conditions attached to a grant (as per the Decision Letter) are in this card. You can upload documents and submit to Foundation North via the Hub.
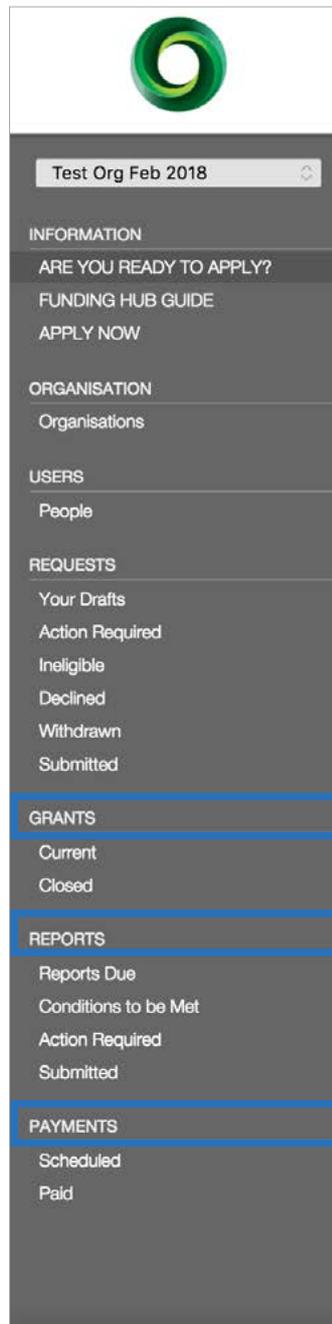
Action Required - any reports or conditions requesting more information are in this card.

Submitted - all submitted reports or conditions are in this card.

F.
Payment

Scheduled - this card holds upcoming payment and details.

Paid - you can track payments paid to your organisation in this card.

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FOUNDATION NORTH
Te Kaitiaki Pūtea ō Tāmaki ō Tai Tokerau

Our funding hub online application process:
When you are ready to apply, go to our website: www.foundationnorth.org.nz/funding

If you have any questions, or need help with your application:
Give us a call 09 360 0291 or 0800 272 878 – Mon-Fri 9am-5pm.