THE CONRAD PREBYS FOUNDATION

Grantee Webinar

Summer 2022 Grant Cycle
Updating Organizational Contacts

- Executive Director, Primary Contact, Primary Investigator (PI)
- Grants Portal Applicant Account
- Financial Liaison
Contracting

- Standard Agreements
- Matching Grant Agreements
- Deadline for Signed Grant Agreements: August 26
Navigating the Grant Portal

**Applications**

Welcome to the Application Page.

1. Select In-Progress or Submitted from the drop down on the right.
2. Click the Application Name to access the information on your application.
3. To delete an application, click the garbage can next to it.
4. Note: if you have a report to submit, the Requirements tab appears at the top. Click to access.

<table>
<thead>
<tr>
<th>Application Name</th>
<th>Project Title</th>
<th>Requested</th>
<th>ID</th>
<th>Last Updated</th>
<th>My Role</th>
<th>Action</th>
</tr>
</thead>
</table>

**Requirements**

Show In Progress Applications

Hide Viewer Only Applications
Payment Process

The Conrad Prebys Foundation utilizes a multi-step payment process for everyone’s security! This process is done electronically through Bill.com.
Bill.com Process

• Bill.com Payment Network ID provided in Application
  • Already connected for ePayment
  • Verify banking information
  • ACH Transfer Test - up next

• Bill.com PNI & Connection Pending
  • Bill.com Form in Grant Portal
  • Enter existing PNI or None
  • If None:
    • Invitation will be sent to Financial Liaison
    • Accept & Create Free Account
    • Enter banking information
Bill.com Account Set Up

• Creating your account
  • Website: Current Grantees > Resources
  • https://www.conradprebysfoundation.org/resources

PAYMENT PROCESS

The Conrad Prebys Foundation utilizes Bill.com, a secure online system, for all payment processing. This document is a Guide on how to accept The Conrad Prebys Foundation’s Bill.com invitation and to create your account.

Bill.com Account Set Up Guide

Click Here
Bill.com Account Set Up (CONTINUED)
Bill.com Account Set Up (CONTINUED)

• The Foundation CANNOT see your banking information.
• Keep the information updated and accurate.
Bill.com Account Confirmation in Grant Portal

• For all organizations that did not provide a PNI in the application:
  • Log into the Grant Portal
  • Complete the Required “Bill.com Information Form”

**DEADLINE to create your Bill.com account and complete the Bill.com Information Form is AUGUST 26, 2022.**
Bill.com Invoices & Payments

• No Invoice Required
• Bill.com will issue an independent payment test to ensure banking information is accurate.
• Payments from the Foundation will display our name in the transaction description in your bank account.
  • Ex: “The Conrad Prebys DES:Receivable ID:02…”
• Records of payment activity is available in Bill.com
ACH Transfer Test ("Penny Test")

- The Foundation will deposit between $.01 and $.10 into your account through Bill.com
- Once this deposit CLEARS your account, fill out and submit an ACH Transfer Test Form in the Grant Portal
Matching Grant Payment Process

• Matching funds must be raised before requesting a payment from the Foundation
• You may request payments as often as quarterly or may choose to submit one payment request for the full grant award
• Access and submit a Matching Grant Payment Request Form through the Grant Portal
• Allow up to 30 days for payments to clear once your Matching Grant Payment Request Form is successfully submitted
Reporting

- Standard Grants
- Grants with Extended Project Periods
Unique Situations

• Amendments & Mid-Grant Period Changes
• No-Cost Extension Policy
• De Minimis Policy
Grant Communications

The following information is intended for the use of grantees to help with Foundation communications, external communications, and funding recognition.
Foundation Communications

• Email Addresses to Save in “Safe Sender List”
  • mail@grantapplication.com
  • info@conradprebysfoundation.org
  • erindecker@conradprebysfoundation.org
  • akritchevsky@conradprebysfoundation.org
  • nikkiphair@conradprebysfoundation.org

• Communication Preferences
Media Process Overview

If you would like to issue a press release, contact the Foundation with details and to approve copy. Please provide adequate turnaround time!

Reference the [Brand Guidelines](#) for information on how to use The Conrad Prebys Foundation name, logos and more.
Logo

- Recommended logo: “Original on Transparent”
- Foundation logos (horizontal & stacked) are available for download on the Resources page.
Sample Credit Lines

This {program/project title} has been made possible in part by The Conrad Prebys Foundation.

The {program/project title} is sponsored by The Conrad Prebys Foundation.
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Questions?