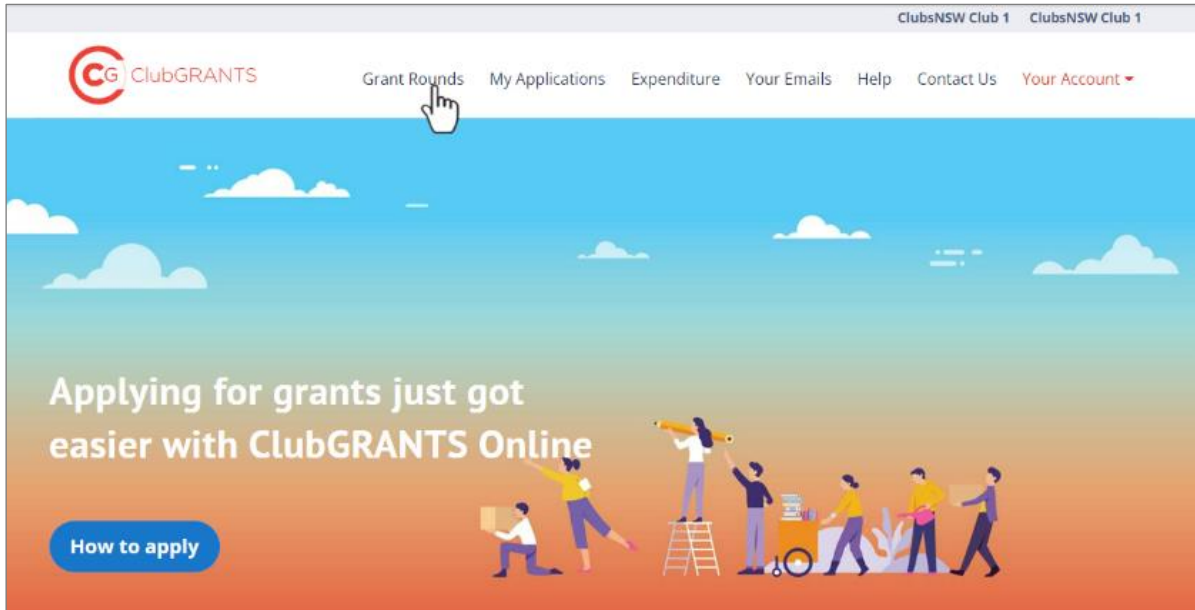




ClubGRANTS

Club User Manual



About ClubGRANTS

ClubGRANTS is one of Australia’s largest grant programs, providing more than \$100 million in cash to a variety of worthy causes across NSW.

Charities, sporting organisations and not-for-profit community groups are among tens of thousands of worthy causes funded through the program each year.

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The screenshot shows the ClubGRANTS Online dashboard. At the top right, it says "ClubsNSW Club 1" twice. The navigation menu includes "Grant Rounds", "My Applications", "Expenditure", "Your Emails", "Help", "Contact Us", and "Your Account". The main heading is "Welcome to ClubGRANTS ONLINE!" with a "Create Grant Round" button. Below this are two summary boxes: "My Open rounds" with a count of 3, and "My Active applications" with a count of 2. A table lists grant rounds with columns for Grant Round, Round Admin, Start Date, End Date, Category, Status, and Apps. A "View archived grant rounds" button is at the bottom left.

GRANT ROUND	ROUND ADMIN	START DATE	END DATE	CATEGORY	STATUS	APPS
LGA 1 GRANT ROUND	ClubsNSW LGA 1	02/06/2022, 9:00am	30/06/2022, 5:00pm	Category 1	Open	1
Magda Testing Again	ClubsNSW Club 1	06/06/2022, 10:01am	22/06/2022, 11:01am	Category 1	Open	1
Magda Testing	ClubsNSW Club 1	06/06/2022, 11:58am	29/06/2022, 2:58am	Category 1	Open	0
Harbour City Club Grants	ClubsNSW Club 1	24/05/2022, 3:09pm	31/12/2022, 3:09pm	Category 2	Open	0



1.0 Getting Started

1.1 How to create a new account

- Visit <https://www.clubgrants.com.au/>
- Click on 'Login/Sign Up' <https://www.clubgrants.com.au/user/login>
- Click on 'Create New Account' <https://www.clubgrants.com.au/user/register>
- Complete the 'Club and LGA User Registration' section on the right-hand side.
- Click on the 'Create new account' button.
- Your submission has been sent; somebody from ClubsNSW will be in contact with you shortly to provide login details.
- Once you have received these, simply Login.
- Accept/Reject the ClubGRANTS Online Terms & Conditions.

1.2 How to log in to an existing account

- Visit <https://www.clubgrants.com.au/>
- Click on 'Login/Sign Up' <https://www.clubgrants.com.au/user/login>
- Fill in your email, password and math question and click the 'Log in' button.

1.3 How to reset your password

- Visit <https://www.clubgrants.com.au/>
- Click on 'Login/Sign Up' <https://www.clubgrants.com.au/user/login>
- Click on 'Reset' your password.
- Fill in your email and math question and click the 'Submit' button.
- Further instructions have been sent to your email address.
- Click on the link and follow the prompts to setup a new password.

1.4 How to update your account/club details

- Login to ClubGRANTS Online <https://www.clubgrants.com.au/user/login>
- Click on the 'Your Account' tab.
- Click on 'Settings' from the drop-down list.
- Update the Address & Website, Primary Contact and/or Secondary Contact sections.
- Click on the 'Update Contact Details' button.
- Contact details have been updated.

1.5 How to change your username (email) or password

- Login to ClubGRANTS Online <https://www.clubgrants.com.au/user/login>
- Click on the 'Your Profile' tab.
- Click on 'Edit User Account' from the drop-down list.
- Update the required sections.
- Click on the 'Save' button.
- The changes have been saved.

1.6 How to view existing users

- All users associated with your club's account will be listed here.
- To have a user removed, please contact ClubsNSW. Refer to the 'Help' tab for details or the 'Contact Us' tab to send a message.

1.7 Manage invited users

- To invite another user to have access to your club's account, click on the Your Profile tab.
- Click on 'Settings' from the drop-down list.
- Scroll to the bottom of the page and click on the 'Add a user' button.
- Fill in the required details:
 - Role types:
 - Admin – All access levels, including inviting other users (most common).
 - User – Unable to invite other users.
 - If the user's email address is already associated with another ClubGRANTS Online account, an error message will display and adding a user was not successful.
- The user has been invited and further instructions have been sent to their email address.
- Once the user accepts, you will see their details under the 'View Existing Users' section.
- If the user does not receive an email, please contact ClubsNSW to manually add the user. Refer to the 'Help' tab for details or the 'Contact Us' tab to send a message.

1.8 Your venues

- If you are the parent club of a group of clubs, then your child club(s) will be listed here.
- To add a child club to your parent club's account, please contact ClubsNSW. Refer to the 'Help' tab for details or the 'Contact Us' tab to send a message.
- Click on the 'Switch to club' button next to each venue to swap between venues.

1.9 How to get help – via the *Contact Us* tab

<https://www.clubgrants.com.au/form/clubgrants-contact>

- Click the Contact Us tab.
- Complete the form to contact the ClubsNSW Member Enquiries Centre (MEC) with any enquiries you may have related to your ClubGRANTS Online account.
 - This page should be used to contact ClubsNSW about any technical issues you may have with the ClubGRANTS Online system.
- Click on the ‘Send message’ button and a member of the team will get back to you with 24 hours, Monday to Friday.
 - A copy of the email will also be sent to you for reference.

1.10 How to get help – via the *Help* tab

<https://www.clubgrants.com.au/faqs>

- Click the Help tab.
- Navigate this page to find most frequently asked questions and useful resources.
- If you are unable to find your answer, click the ‘Email’ or ‘Call ClubASSIST on 1300 730 001’ button to get in touch the ClubASSIST.

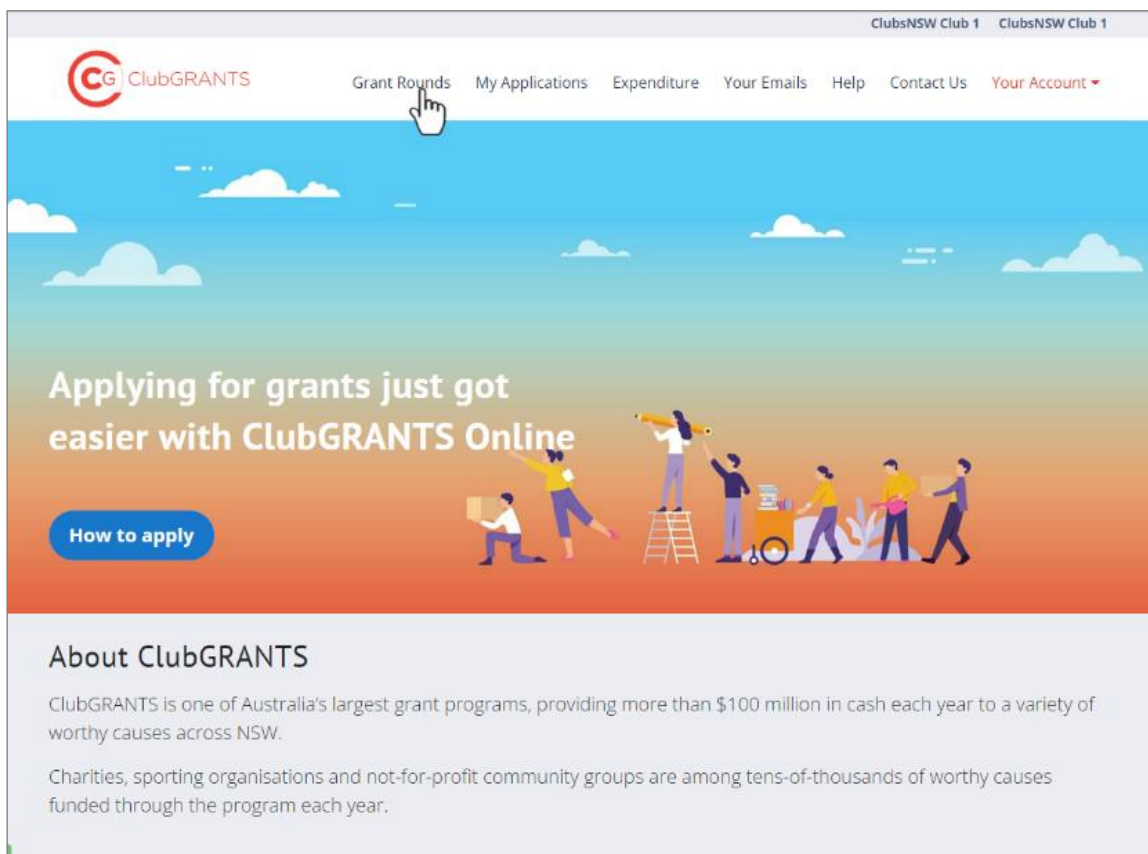
1.11 How to log out

- Click on the ‘Your Profile’ tab.
- Click on ‘Logout’ from the drop-down list.
- You are now logged out of ClubGRANTS Online.

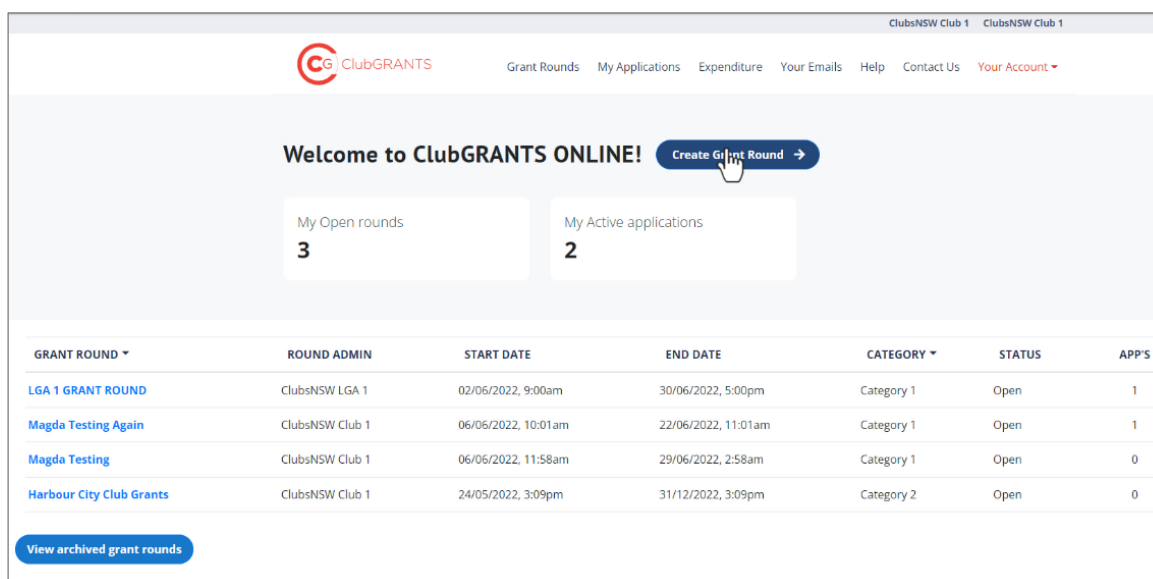
2.0 Creating a Grant Round

2.1 How to create a new grant round

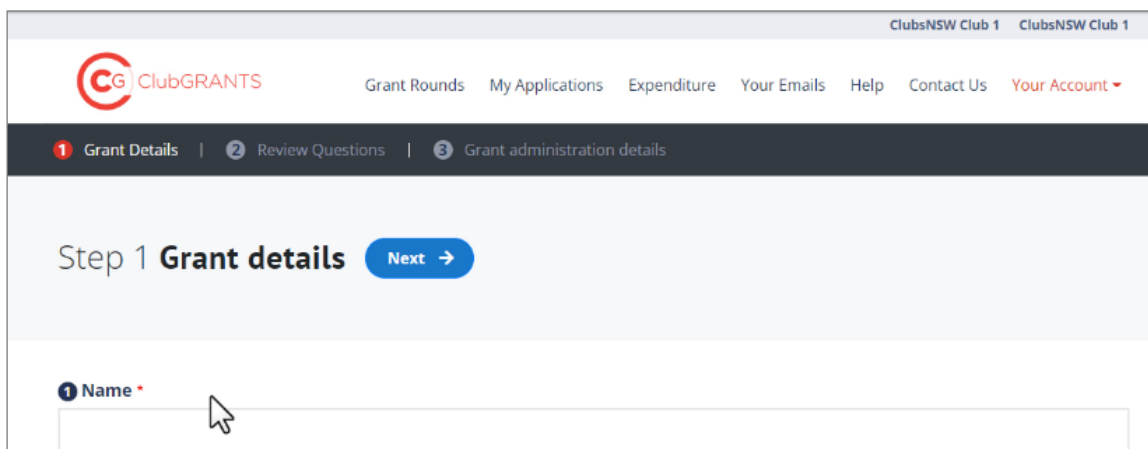
- Login.
- Click on the 'Grant Rounds' tab.



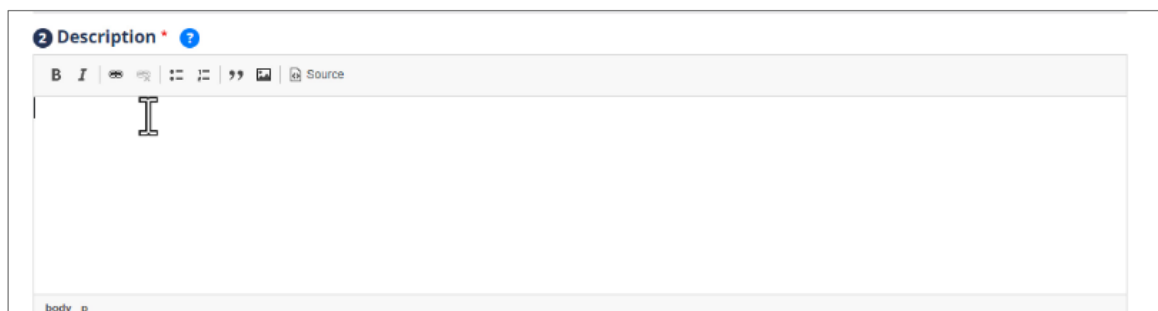
- Click on the 'Create Grant Round' button.



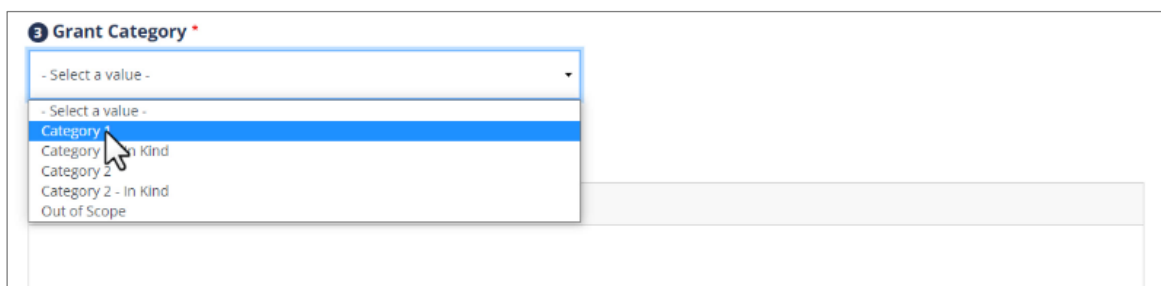
- ‘Step 1 Grant details’.
 - Update the required sections:
 - Sections with an * are mandatory.
 - Name – Name of the grant round which will display to organisations.



- ‘Description’ – This section will display to organisations when searching for and applying to the grant round. Consider including any relevant information for the organisation to consider.



- ‘Grant Category’ – Category 1 & 2, in – kind and out of scope categories available.



- ‘Local Area Priorities’ – For category 1 grant rounds: if your local area priorities are available, select them from the list to display to organisations when searching for the grant round. If your local area priorities are not listed or you do not wish for these to display, this section does not need to be filled out.

Local Area Priorities ?

Select local area priorities

Community welfare and social services

- Aged, Disability or Youth Services
- Child Protection / Child Care
- Counselling Services
- Family Support / Emergency or Low Cost Accommodation
- Victims of Natural Disasters
- Volunteer Emergency Services
- Veteran Welfare Services

Community development

- Tenants Services
- Statewide or Regional Services Developing Social Policies and/or providing Advocacy for Local Communities
- Community Transport Services
- Neighbourhood Centre / Youth Drop In Activities
- Community Education Programs

Community health services

- Health Promotion Initiatives
- Early Childhood Health / Child and Family Services
- Drug and Alcohol / Palliative Care / Women's Health / Aboriginal Health / Dental Services

- 'Special Instructions' – Considering including any additional information, like contact details.

Special Instructions ?

B I [link icon] [unlink icon] [bulleted list icon] [numbered list icon] [indent icon] [outdent icon] [source icon]

- 'Use Custom Identifier' – Tick this box if you would like to use your own naming convention.
 - Example: Fairfield council may want prefix FC and suffix -2022, so all applications will be in order FC1-2022, FC2-2022, FC3-2022 ...

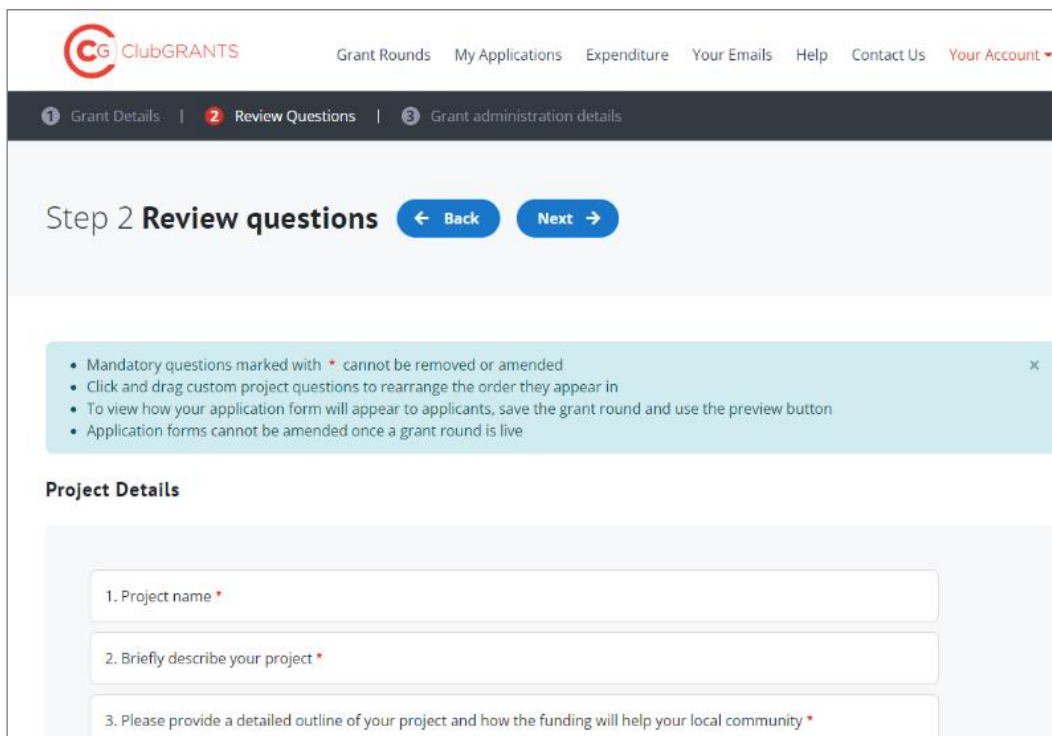
Use Custom Identifier ?

Custom Identifier Prefix

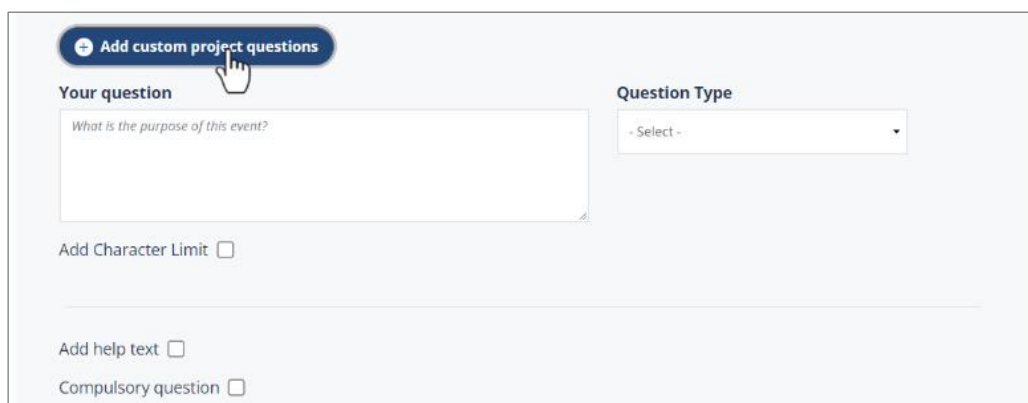
Custom Identifier Suffix

- Click on the 'Next' button.

- ‘Step 2 Review questions’:
 - Mandatory questions marked with * cannot be removed or amended.



- Click and drag custom project questions to rearrange the order they appear in.
 - Click on the ‘+ Add custom project questions’ button on the Project Details and Funding Details Sections to add additional questions to the application form.
 - ‘Your question’: add your question here.
 - ‘Question type’: choose from various question formats and click on the ‘save’ button.
 - Example – if you would like organisations to have the ability to attach documents to the application form, add the ‘file’ question type – Add Financial Reports or additional documents here:
 - ‘Add help text’: tick the box to add help text to the question.
 - ‘Mandatory question’: tick the box to make the question mandatory.



- Click on the ‘Next’ button.
- ‘Step 3 Grant administration details’:
 - Review/ update the required sections:
 - ‘Start Date’ and time.
 - ‘End Date’ and time.

The screenshot shows the 'Step 3 Grant administration details' page. At the top, there is a navigation bar with 'ClubGRANTS' logo and links for 'Grant Rounds', 'My Applications', 'Expenditure', 'Your Emails', 'Help', 'Contact Us', and 'Your Account'. Below this is a progress indicator with three steps: '1 Grant Details', '2 Review Questions', and '3 Grant administration details'. The main heading is 'Step 3 Grant administration details' with 'Back', 'Save', and 'Save & Close' buttons. The form content includes:

- Grant administrator:** ClubsNSW Club 1
- Grant name & category:** ClubName Cat1 2022, Category 1
- What is the start and end time/date for the grant round? * ***
 - Start date *:** Input field with 'dd/mm/yyyy' placeholder, a calendar icon, and a time selector.
 - End date *:** Input field with 'dd/mm/yyyy' placeholder, a calendar icon, and a time selector.

- Edit the Primary and Secondary contact details for the grant round as required.

The screenshot shows the contact details form. It is divided into two main sections:

- Add/Edit Primary Contact*:**
 - Name: Paul Kouglas
 - Role: Admin
 - Phone: 999 9999 999
 - Email: me@me.com
 - There is a radio button selected for the primary contact.
- Hide payment method required for this grant?:** An unchecked checkbox.
- Add/Edit Secondary Contact:**
 - Name: [Empty field]
 - Role: [Empty field]
 - Phone: [Empty field]
 - Email: [Empty field]

- ‘Hide payment method required for this grant’: tick the box if you wish to remove the payment section from the grant round.
 - Example – remove payment section for in – kind applications.

This is a close-up of the checkbox labeled 'Hide payment method required for this grant?'. The checkbox is currently unchecked.

- ‘Enabled’ – if ticked then this grant round will appear in search results on the Find my Grant Round search. Leaves this unticked where you only want to share the grant round via email or via your website.
- ‘Display Before Open’ – If ticked the grant round will display in search for three months prior to its set to go live.
 - Organisations will not be able to apply to the grant round during this time.
- ‘Is there a ClubGRANTS Local Committee?’ – tick this if the grant round is a council wide round and multiple users can view the applications. Leave this unticked if the grant round is only for your club.

Enabled
Enable this grant round so that it appears in grant search results and accepts applications between the start and close dates.

Display before open
If checked, the grant round will be displayed in search for 3 months before it is due to go live but will not accept applications outside the open and close date range. Note that this field requires the round to be enabled.

Is there a ClubGRANTS Local Committee?
If checked, the system will allow for applications to be assessed by multiple users to create an average ranking. If you do not check the box, the system will allow for applications to be ranked by a more simple high, medium or low ranking.

- ‘Save’: click on this button to save the application and come back to it later.
- To view how your application form will appear to applicants, save the grant round, and use the preview button.
 - The white ‘Actions’ button is located in the dashboard on the ‘Grant Rounds’ tab and can be used to preview a grant round before it goes live.

Welcome to ClubGRANTS ONLINE! [Create Grant Round](#) →

My Open rounds
3

My Active applications
2

GRANT ROUND	ROUND ADMIN	START DATE	END DATE	CATEGORY	STATUS	APPS	Actions
ClubName Cat1 2022	ClubsNSW Club 1	01/09/2022, 9:00am	30/09/2023, 5:00pm	Category 1	Closed	0	Actions
LGA 1 GRANT ROUND	ClubsNSW LGA 1	02/06/2022, 9:00am	30/06/2022, 5:00pm	Category 1	Open	1	<ul style="list-style-type: none"> Edit Preview Archive Round Link
Magda Testing Again	ClubsNSW Club 1	06/06/2022, 10:01am	22/06/2022, 11:01am	Category 1	Open	1	Actions
Magda Testing	ClubsNSW Club 1	06/06/2022, 11:58am	29/06/2022, 2:58am	Category 1	Open	0	Actions
Harbour City Club Grants	ClubsNSW Club 1	24/05/2022, 3:09pm	31/12/2022, 3:09pm	Category 2	Open	0	Actions

- Application forms cannot be amended once a grant round is live.
- ‘Round Link’: Copy this link to share on social media/website, in newsletters, advertising, etc.
 - This link will not display until the grant round is live, except in the instance that the ‘Display before open’ box has been ticked.

[Copy](#)

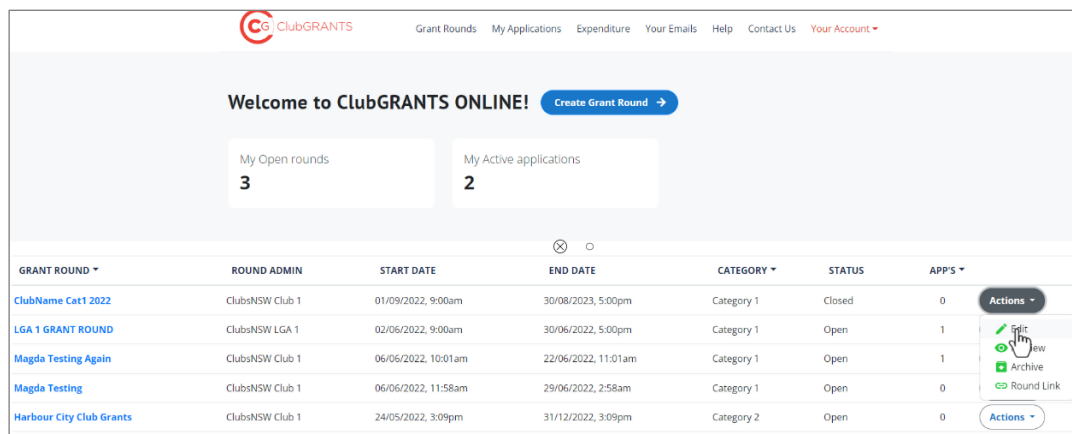
[Close](#)

- ‘Save & Close’: click on this button when the grant round is completed and ready to go live from the start date. ***If this button is not clicked, the grant round will not go live from the start date.***

[← Back](#)
[Save](#)
[Save & Close ×](#)

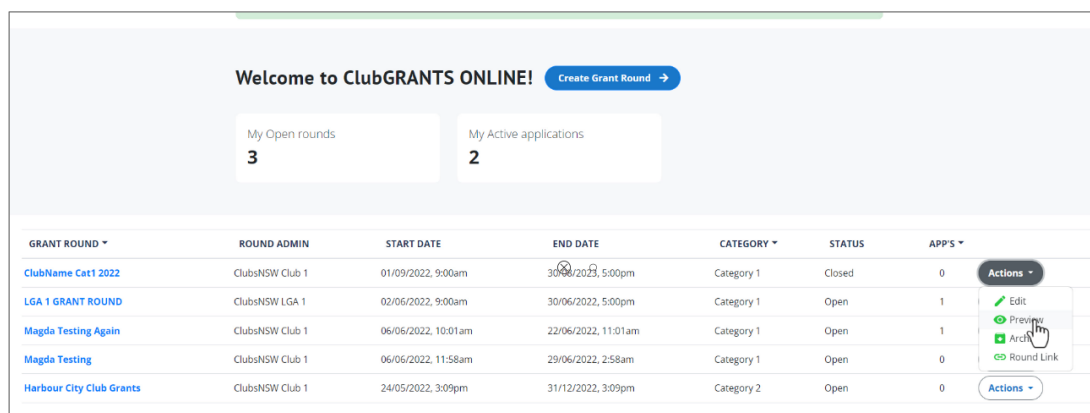
2.2 How to edit grant rounds

- The white Actions' button is located in the dashboard on the 'Grant Rounds' tab and can be used to edit grant rounds before they go live.
- The icon can be used to amend opening and closing dates at anytime.
- Application forms cannot be edited once an application have been received to that round.
- The icon will not display for rounds for which you are not the grant round owner.



2.3 How to preview grant rounds

- The white 'Actions' button located in the dashboard on the 'Grant Rounds' tab and can be used to preview grant rounds before they go live.



2.4 How to archive grant rounds

- The white 'Actions' button located in the dashboard on the 'Grant Rounds' tab and can be used to archive grant rounds.
- Archiving grant rounds removes the grant round from view and does not permanently delete the grant round.
- Click on the 'View archived grant rounds' button to view and restore grant rounds.

The screenshot shows the ClubGRANTS ONLINE interface. At the top, there is a navigation bar with the ClubGRANTS logo and links for Grant Rounds, My Applications, Expenditure, Your Emails, Help, Contact Us, and Your Account. Below the navigation bar, a welcome message reads "Welcome to ClubGRANTS ONLINE!" with a "Create Grant Round" button. Two summary boxes show "My Open rounds: 5" and "My Active applications: 4". The main content is a table of grant rounds.

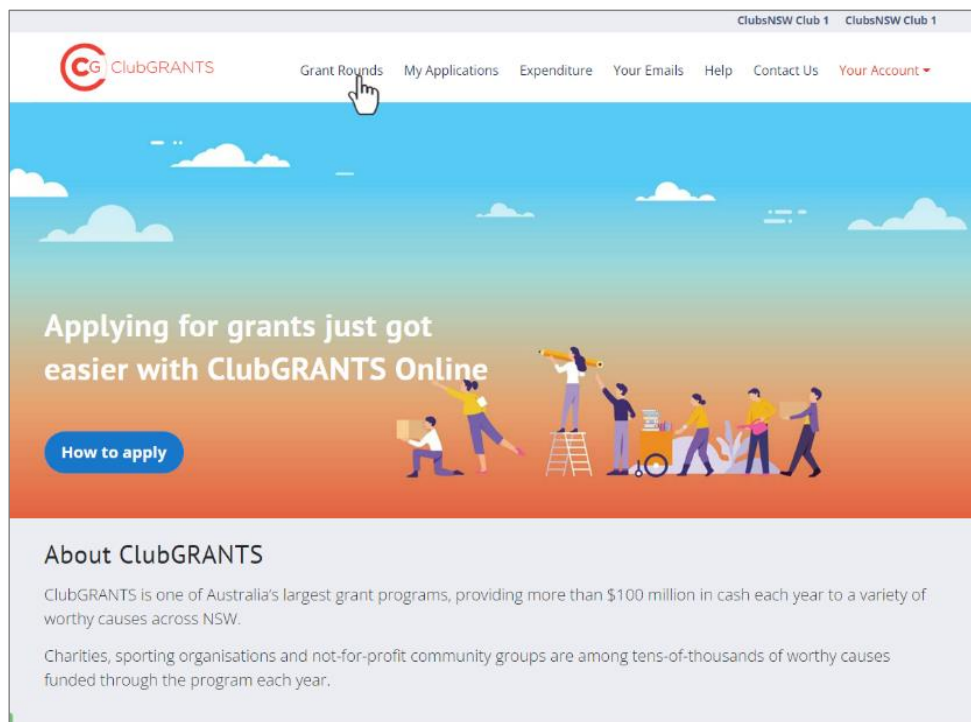
GRANT ROUND	ROUND ADMIN	START DATE	END DATE	CATEGORY	STATUS	APPS	
ClubName Cat1 2022	ClubsNSW Club 1	01/06/2022, 9:00am	30/08/2023, 5:00pm	Category 1	Open	2	Actions
LGA 1 GRANT ROUND	ClubsNSW LGA 1	02/06/2022, 9:00am	30/06/2022, 5:00pm	Category 1	Open	2	<ul style="list-style-type: none"> Edit Preview Archive Round Link
Magda Testing Again	ClubsNSW Club 1	06/06/2022, 10:01am	22/06/2022, 11:01am	Category 1	Open	1	
Magda Testing	ClubsNSW Club 1	06/06/2022, 11:58am	29/06/2022, 2:58am	Category 1	Open	0	
Harbour City Club Grants	ClubsNSW Club 1	24/05/2022, 3:09pm	31/12/2022, 3:09pm	Category 2	Open	0	Actions

- ‘Total requested amount this grant year’, ‘Total funded amount this grant year’ and ‘Total number of applications this grant year’ boxes will populate as applications are received and funded.
- Click on the ‘Request export’ button to download an excel export of applications received.
- Your export has been queued and will be available shortly.
 - The download will occur in the background of the system, continue to review applications, or refresh the page after a few minutes for the export to appear.
 - Grant rounds with a large amount of applications (100+) may take longer to load.

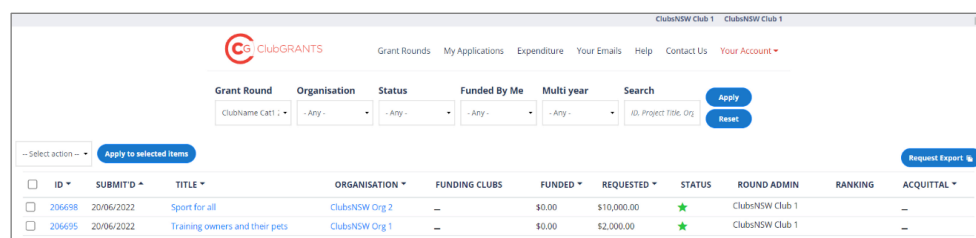
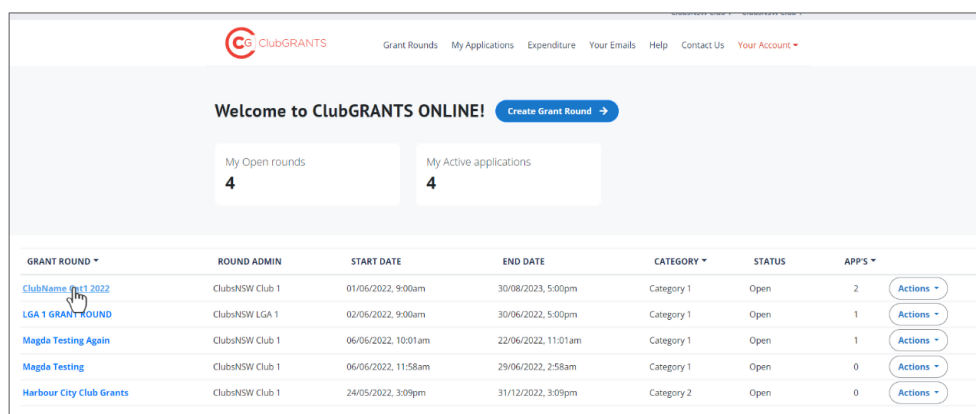
3.0 Managing a Grant Round

3.1 How to review/approve applications

- Click on the 'Grant Rounds' tab.



- Click on the grant round name in the 'Grant Round' column to display applications within that round.



- Click on the 'ID' or 'Title' of the application to review the application.

ID	SUBMITTED	TITLE	ORGANISATION	FUNDING CLUBS	FUNDED	REQUESTED	STATUS	ROUND ADMIN	RANKING	ACQUITTAL
206698	20/06/2022	MUSIC for the children	ClubsNSW Org 1	—	\$0.00	\$12,000.00	★	ClubsNSW Club 1	—	—
206698	20/06/2022	Sport for all	ClubsNSW Org 2	ClubsNSW Club 1	\$7,000.00	\$10,000.00	✓	ClubsNSW Club 1	—	📄
206698	20/06/2022	Training women and their girls	ClubsNSW Org 1	ClubsNSW Club 1	\$3,000.00	\$2,000.00	✓	ClubsNSW Club 1	—	📄

- Review the application form:
 - Contact details for the organisation are listed on the left-hand side, at the top of the application form.
 - Scroll down for the body of the application form.

SUBMITTED APPLICATION
Sport for all

← Back PDF

GRANT ROUND OWNER:
ClubsNSW Club 1

GRANT ROUND:
ClubName Cat1 2022

CATEGORY:
Category 1

APPLICATION ID:
206698

SUBMITTED DATE:
June 20, 2022

Application status
New

Purpose of funds
CS - Health Promotion Initiatives

Attached Files
Add a new file
Choose files No file chosen

- ‘Application statu’s’:
 - **‘New’** – default status.
 - **‘Under review’** – change the status to under review to let organisations know the application is being reviewed, no email notifications will be sent to the organisation.
 - **‘Approved’** – change the status to approved for approved applications
 - Approving an application will not trigger an email to the organisation for category 1 & 2 grant rounds, an email will trigger when funding is added.
 - For category 1 & 2 in – kind rounds, approving an application will trigger an email to the organisation, a second email will not trigger when funding is added.
 - Refer to the Your Emails tab for email templates and more information on when emails will trigger.
 - Approving an application will allow an organisation to upload a progress report and/or acquittal.
 - Organisations will not be able to upload a progress report and/or acquittal if an application is not approved on the system.

SUBMITTED APPLICATION

Sport for all

← Back PDF

GRANT ROUND OWNER:
ClubsNSW Club 1

GRANT ROUND:
ClubName Cat1 2022

CATEGORY:
Category 1

APPLICATION ID:
206698

SUBMITTED DATE:
June 20, 2022

AMOUNT REQUESTED:
\$10,000.00

Application status

New
- None -
New
Under Review
Approved
Withdrawn
Finalised
Unsuccessful

Attached Files

Add a new file

Choose files No file chosen

Unlimited number of files can be uploaded to this field.
100 MB limit.
Allowed types: txt doc docx pdf xls xlsx csv ppt pptx.

Primary contact details:

APPLICANT NAME:

Don't forget to save your changes!

Save

- Add Funding – when the status is approved, an 'Add funding +' button will appear.
 - Click on the 'Add funding +' button.

Sport for all

← Back PDF

GRANT ROUND OWNER:
ClubsNSW Club 1

GRANT ROUND:
ClubName Cat1 2022

CATEGORY:
Category 1

APPLICATION ID:
206698

SUBMITTED DATE:
June 20, 2022

AMOUNT REQUESTED:
\$10,000.00

Application status

Approved

Purpose of funds

C5 - Health Promotion Initiatives

Should the applicant select the incorrect purpose of funds option, you can modify it here.

Attached Files

Add a new file

Choose files No file chosen

Unlimited number of files can be uploaded to this field.
100 MB limit.
Allowed types: txt doc docx pdf xls xlsx csv ppt pptx.

This application is to be funded over multiple years

Don't forget to save your changes!

Save

Add Funding +

Primary contact details:

APPLICANT NAME:
Primary Contact Name

PHONE NUMBER:
Primary Contact Phone

EMAIL:
Primary Contact Email

- Add the amount of funding being provided

Funding form ✕

Amount to be funded *

Funding Club

ClubsNSW Club 1 (183076)
○

Fund
Cancel

- Click on the 'Fund' button, an email will trigger when funding is added.
- More than 1 club can fund the same application, an email will trigger when funding is added from each club.
- The funding amount can be more, less or equal to, the amount requested by the organisation.
- When funding is added, the application will also add funding details to the 'Expenditure' tab.

ClubsNSW Club 1

GRANT ROUND:
ClubName Cat1 2022

CATEGORY:
Category 1

APPLICATION ID:
206698

SUBMITTED DATE:
June 20, 2022

AMOUNT REQUESTED:
\$10,000.00

Primary contact details:

APPLICANT NAME:
Primary Contact Name

PHONE NUMBER:
[Primary Contact Phone](#)

EMAIL:
[Primary Contact Email](#)

ORGANISATION:
[ClubsNSW Org 2](#)

ORGANISATION ADDRESS:
Primary Address 1
Primary Suburb
Primary State

Approved

Purpose of funds

CS - Health Promotion Initiatives
▼

Should the applicant select the incorrect purpose of funds option, you can modify it here.

Attached Files

Add a new file

Choose files
No file chosen

Unlimited number of files can be uploaded to this field.
100 MB limit.
Allowed types: txt doc docx pdf xls xlsx csv ppt pptx.

This application is to be funded over multiple years

! Don't forget to save your changes!

Save

Add Funding +

CLUB	CASH DONATION	YEAR
ClubsNSW Club 1	\$7,000.00	2022
	\$7,000.00	

- **‘Withdrawn’** – change the status to withdrawn if an applicant requests for their application to be withdrawn.
 - Applicants can also withdraw their own applications.
- **‘Finalised’** – change the status to finalised once an acquittal has been provided and the reporting process is completed.
- **‘Unsuccessful’** – change the status to unsuccessful for rejected/ unsuccessful applications, an email notification will be sent to the organisation.
 - **‘Purpose of funds’:**
 - Should the applicant select the incorrect purpose of funds option, you can modify it here.

GRANT ROUND OWNER:
ClubsNSW Club 1

GRANT ROUND:
ClubName Cat1 2022

CATEGORY:
Category 1

APPLICATION ID:
206698

SUBMITTED DATE:
June 20, 2022

AMOUNT REQUESTED:
\$10,000.00

Primary contact details:

APPLICANT NAME:
Primary Contact Name

PHONE NUMBER:
Primary Contact Phone

EMAIL:
Primary Contact Email

ORGANISATION:
ClubsNSW Org 2

ORGANISATION ADDRESS:
Primary Address 1
Primary Suburb

Application status

Approved

Purpose of funds

C5 - Health Promotion Initiatives

- None -

A1 - Family Support / Emergency or Low Cost Accommodation

A2 - Child Protection / Child Care

A3 - Counselling Services

A4 - Aged, Disability or Youth Services

A5 - Victims of Natural Disasters

A6 - Volunteer Emergency Services

A7 - Veteran Welfare Services

B1 - Neighbourhood Centre / Youth Drop In Activities

B2 - Community Transport Services

B3 - Community Education Programs

B4 - Tenants Services

B5 - Statewide or Regional Services Developing Social Policies and/or providing Advocacy for Local Communities

C1 - Early Childhood Health / Child and Family Services

C2 - Community Nursing / Therapy / Mental Health Services

C3 - Drug and Alcohol / Palliative Care / Women's Health / Aboriginal Health / Dental Services

C4 - Home and Community Care and Disability Services

C5 - Health Promotion Initiatives

D1 - Employment Placement / Advocacy Services

D2 - Group Training Companies

CLUB	CASH DONATION	YEAR
ClubsNSW Club 1	\$7,000.00	2022
	\$7,000.00	

- **‘Add a new file’/ ‘Attached files’:**
 - Clubs and committees can upload and attach documents to application forms by clicking on the ‘Choose files’ button.

Attached Files

Add a new file

Choose files No file chosen

Unlimited number of files can be uploaded to this file. No file chosen
100 MB limit.
Allowed types: txt doc docx pdf xls xlsx csv ppt pptx.

- Example: attach a customised ‘Letter of Offer’ to the application form for successful applications. Advise the organisation of the documents by adding in a line to your Approved email template i.e. Refer to the Attached Files section of your application form for additional information.
- Example 2: attach a ‘Helpful Tips’ document to unsuccessful emails to help organisations achieve success next time. Advise the organisation of the documents by adding in a line to your Unsuccessful email template i.e. Refer to the Attached Files section of your application form for helpful times for next time.

- All documents uploaded to this section are visible to both the club and the organisation.
- Committee feedback, assessment forms, etc. should not be uploaded here.
 - Click on the ‘Save’ button.
 - If an organisation attaches documents to their application form, the documents will appear here.
 - When an organisation submits a progress report or acquittal form, the documents will appear here.
- ‘Email Log’:
 - An email log is included at the bottom of each application form.
- Click the Organisation name to view previous activity on ClubGRANTS Online from this organisation.

Email Log		
SENT	TO	SUBJECT
20/06/2022 - 6:44pm	me@me.com	You have received a new ClubGRANTS Application
20/06/2022 - 6:44pm	Primary Contact Email	Thank you for your ClubGRANTS Submission

3.2 Assessment process (normally used for LGA Grant Round)

- From the ‘Grant Rounds’ tab:
 - Click on a grant round title to open the relevant round you are reviewing

GRANT ROUND	ROUND ADMIN	START DATE	END DATE	CATEGORY	STATUS	APPS	Actions
LGA 1 GRANT ROUND	ClubsNSW LGA 1	00/06/2022, 9:00am	30/06/2022, 5:00pm	Category 1	Open	2	Actions

- Click on the ‘ID’ or ‘Title’ of the application to review the application

ID	SUBMITTED	TITLE	ORGANISATION	FUNDING CLUBS	FUNDED	REQUESTED	STATUS	ROUND ADMIN	RANKING	ACQUITTAL
20000000	21/06/2022	Save the trees	ClubsNSW Org 1	---	\$0.00	\$23,000.00	★	ClubsNSW LGA 1	---	---
20000001	14/06/2022	TSSTTTTTTTTTTTTT	ClubsNSW Org 1	ClubsNSW Club 1, ClubsNSW Club 2	\$321.00	\$111,111.00	✓	ClubsNSW LGA 1	---	---

- Review the application and then click on the 'Add Assessment +' button.

- Review and edit the Assessment Form.

- Conflict of Interest – answer the question regarding if you or the organisation you represent has a conflict of interest or a perceived conflict of interest. This mostly applies to organisations such as NCOSS representatives who also have a grant application in the current grant round.

Does this application present you with a conflict of interest or a perceived conflict of interest?

N/A
 No
 Yes

[If you do have a conflict of interest do not assess this application](#)

- Assessment Form – you can now begin completing the formal assessment of the application
 - ‘Are the project objectives achievable?’
 - Select value: Yes; No; Unknown.



Are the project objectives achievable? *

- Select a value -

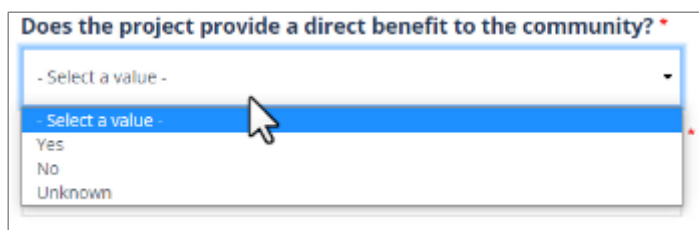
- Select a value -

Yes

No

Unknown

- ‘Does the project provide a direct benefit to the community?’
 - Select from values: Yes; No; Unknown.



Does the project provide a direct benefit to the community? *

- Select a value -

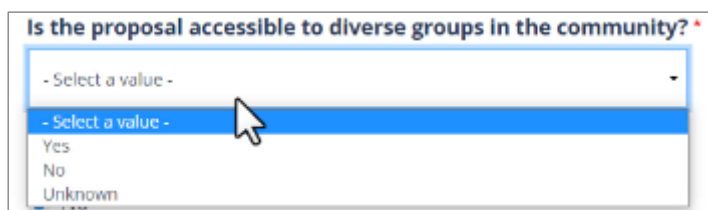
- Select a value -

Yes

No

Unknown

- ‘Is the proposal accessible to diverse groups in the community?’
 - Select from values: Yes; No; Unknown.



Is the proposal accessible to diverse groups in the community? *

- Select a value -

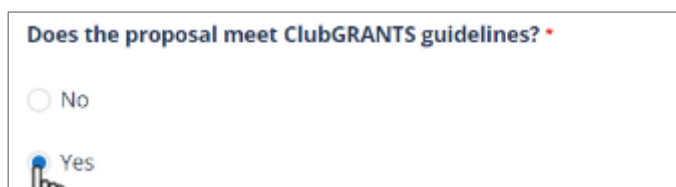
- Select a value -

Yes

No

Unknown

- ‘Does the proposal meet ClubGRANTS guidelines?’
 - Select Yes or No.

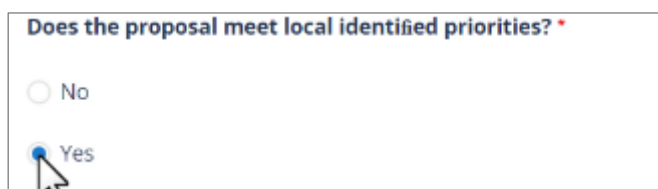


Does the proposal meet ClubGRANTS guidelines? *

No

Yes

- ‘Does the proposal meet local identified priorities?’
 - Select Yes or No.

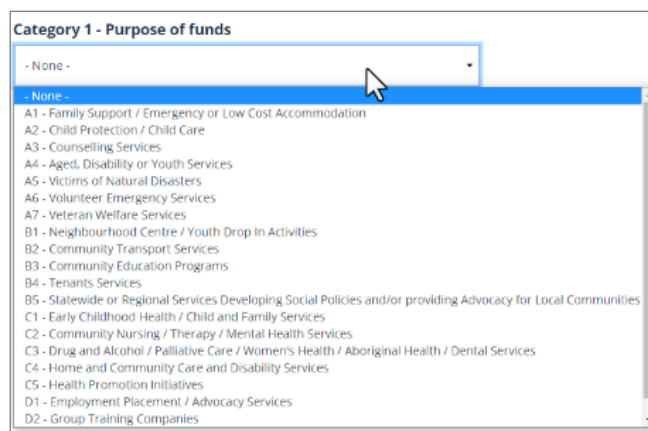


Does the proposal meet local identified priorities? *

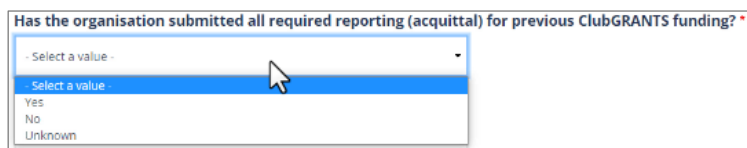
No

Yes

- ‘Category 1 – Purpose of funds’ – select the option from the drop-down list.
 - Even though the applicant has selected this in the application process, this is an opportunity to review the purpose.



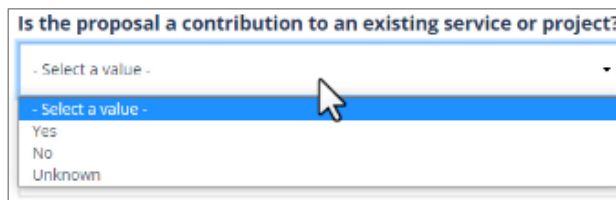
- ‘Has the organization submitted all required reporting (acquittal) for previous ClubGRANTS funding?’
 - Select value: Yes; No; Unknown.



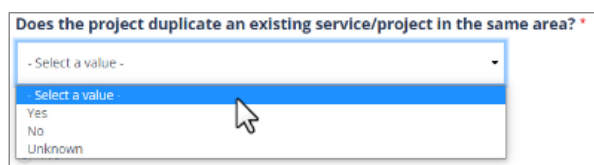
- ‘Is this a new project?’
 - Select value: Yes; No; Unknown



- ‘Is the proposal a contribution to an existing service or project?’
 - Select value: Yes; No; Unknown



- ‘Does the project duplicate an existing service/project in the same area?’
 - Select value: Yes; No; Unknown



- 'Is the budget realistic to achieve desired outcomes?'
 - Select value: Yes or No.

The screenshot shows a form titled "Is the budget realistic to achieve desired outcomes? *". There are two radio buttons: "No" and "Yes". The "Yes" radio button is selected, and a mouse cursor is pointing at it.

- 'Will the project be successful if given partial funding?'
 - Select value: Yes; No; Unknown.

The screenshot shows a form titled "Will the project be successful if given partial funding? *". A dropdown menu is open, showing the options: "- Select a value -", "Yes", "No", and "Unknown". A mouse cursor is pointing at the "Yes" option.

- 'Project Ranking'
 - Select value: 1-Low; 2-Medium; 3-High.
 - For applications with multiple reviews the average of these scores will be automatically calculated.

The screenshot shows a form titled "Project Ranking *". A dropdown menu is open, showing the options: "- Select a value -", "1 - Low", "2 - Medium", and "3 - High". A mouse cursor is pointing at the "1 - Low" option.

- 'Special Conditions/Feedback for Committee'.
- 'Feedback for Applicant':
 - These fields are free text and provide an opportunity to provide further detail on your review of the application.
- When completed, Click 'Save'.

The screenshot shows two text input fields. The top field is labeled "Special Conditions/Feedback for Committee" and contains a cursor. The bottom field is labeled "Feedback for Applicant". A "Save" button is located at the bottom right of the form.

3.3 How to download a PDF (PDF format, individual application)

- Click on the ID or Title of the application to view the application
- Click on the 'PDF' button to download a PDF copy of the application.

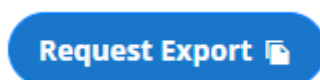


3.4 How to export grant rounds (Excel format, all applications)

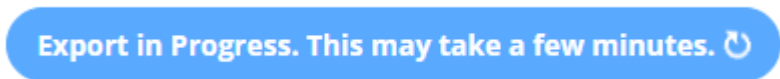
- From the 'Grant Rounds' tab:
 - Click on a grant round title to open the round

GRANT ROUND	ROUND ADMIN	START DATE	END DATE	CATEGORY	STATUS	APPS	
ClubName Int 1 2022	ClubsNSW Club 1	01/06/2022, 9:00am	30/08/2023, 5:00pm	Category 1	Open	2	Actions
LGA 1 GRANT ROUND	ClubsNSW LGA 1	02/05/2022, 9:00am	30/06/2022, 5:00pm	Category 1	Open	1	Actions
Magda Testing Again	ClubsNSW Club 1	06/06/2022, 10:01am	22/06/2022, 11:01am	Category 1	Open	1	Actions
Magda Testing	ClubsNSW Club 1	06/06/2022, 11:58am	29/06/2022, 2:58am	Category 1	Open	0	Actions
Harbour City Club Grants	ClubsNSW Club 1	24/05/2022, 3:09pm	31/12/2022, 3:09pm	Category 2	Open	0	Actions

- Click on the 'Request export' button to download an excel export of applications received.



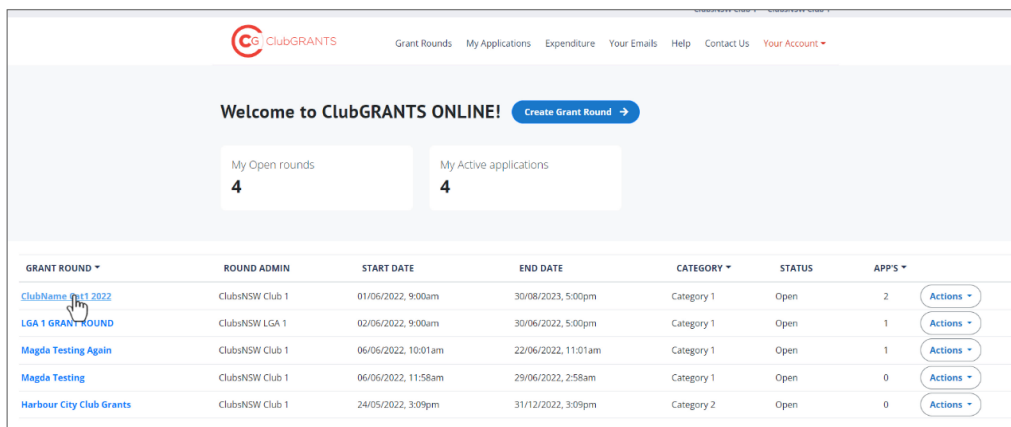
- Your export has been queued and will be available shortly.



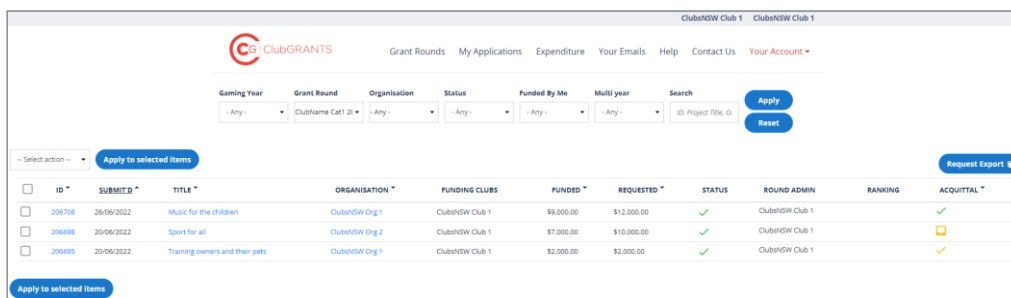
- The download will occur in the background of the system, continue to review applications, or refresh the page after a few minutes for the export to appear.
- Grant rounds with a large amount of applications (100+) may take longer to load.

3.5 How to a progress report/acquittal

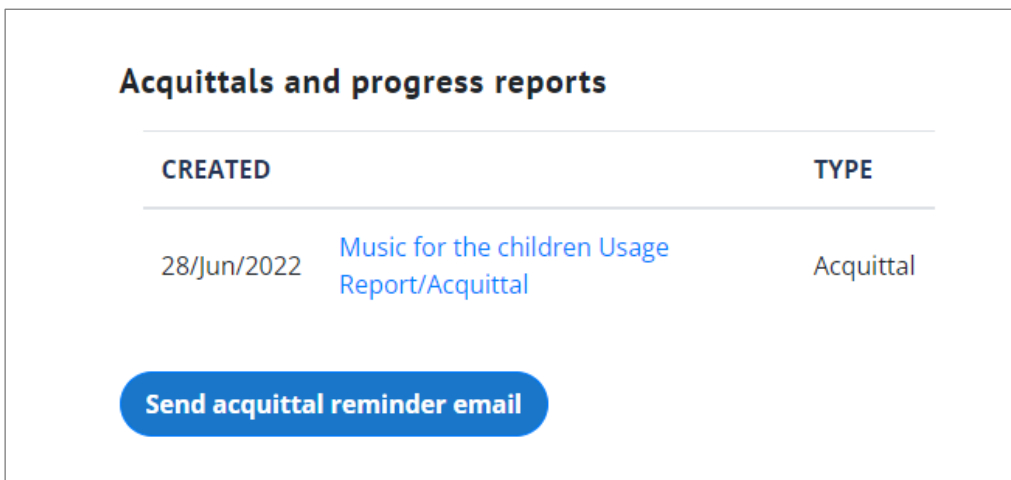
- From the 'Grant Rounds' tab:
 - Click on a grant round title to open the round.



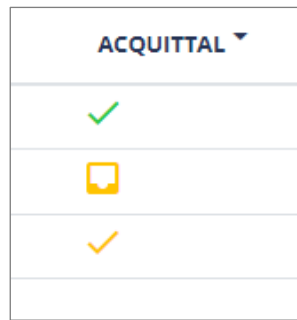
- Click on the 'ID' or 'Title' of the application to view the application.



- The progress report or acquittal display in the Attached Files section.

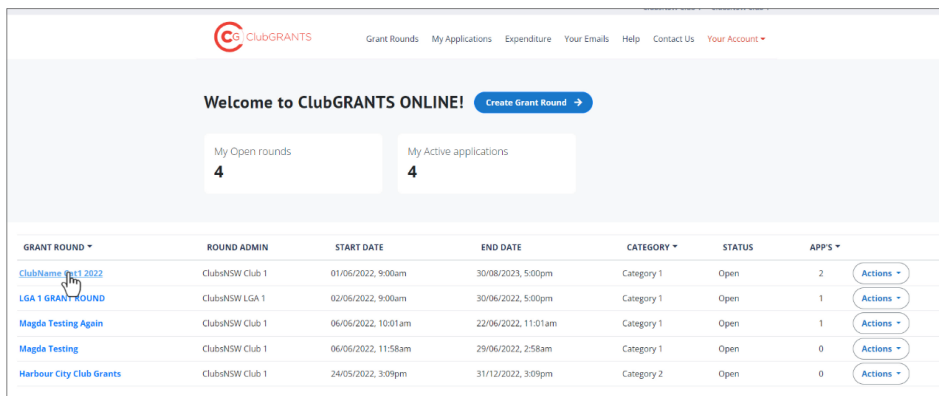


- Applications with a Progress Report submitted will display a yellow tick in the Acquittal column on the dashboard.
- Applications with an Acquittal submitted will display a green tick in the Acquittal column on the dashboard, the grant round owner will also be notified via email when an acquittal is submitted.
- Applications without a Progress Report or Acquittal submitted will display a yellow tray icon in the Acquittal column on the dashboard.

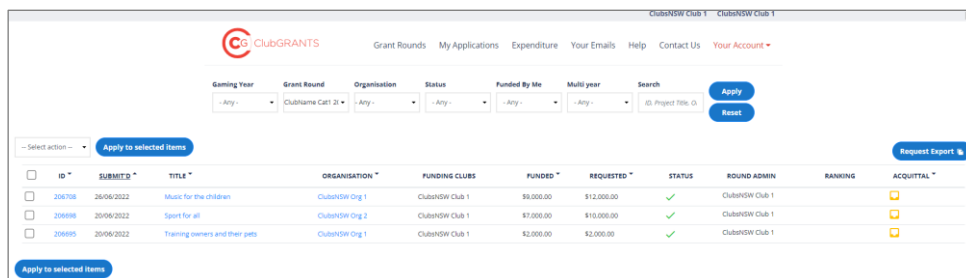


3.6 How to send acquittal reminder email

- From the 'Grant Rounds' tab:
 - Click on a grant round title to open the round.



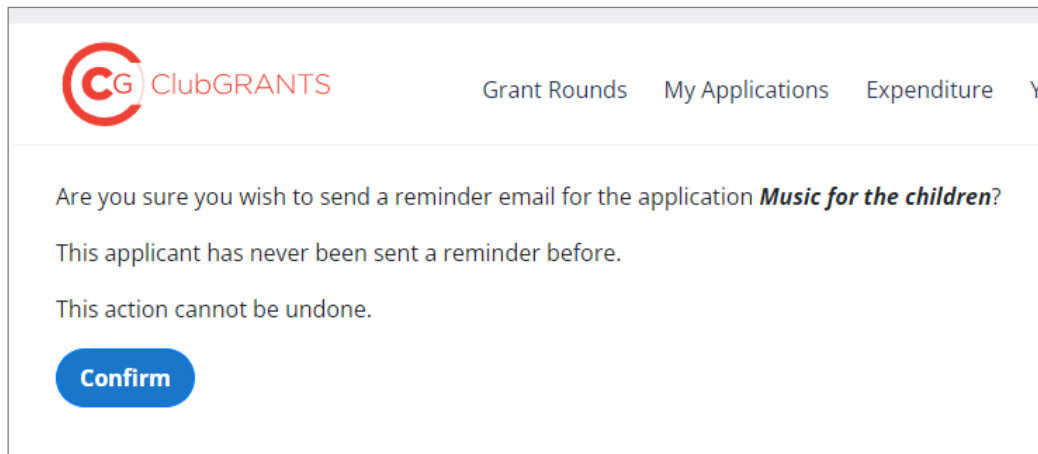
- Find the application and click on the yellow tray icon.



- A pop up will display, click on the 'Send acquittal reminder email' button.



- Follow the prompts and click on the 'Confirm' button.



- Email reminder sent.

4.0 My Applications Tab

4.1 How to filter applications

- From the 'My Applications' tab:
 - Use various filters to sort applications.

The screenshot shows the ClubGRANTS interface with the 'My Applications' tab selected. At the top, there are navigation links: Grant Rounds, My Applications, Expenditure, Your Emails, Help, Contact Us, and Your Account. Below this is a filter bar with dropdown menus for 'Granting Year', 'Grant Round', 'Organisation', 'Status', 'Funded By Me', and 'Multi year'. A search box is also present with a blue 'Apply' button. Below the filter bar, there is a table of applications. The table has columns for ID, SUBMITTED, TITLE, ORGANISATION, FUNDING CLUBS, FUNDED, REQUESTED, STATUS, ROUND ADMIN, RANKING, and ACQUITTAL. The table contains several rows of application data. Below the table, there is a blue button labeled 'Apply to selected items'.

ID	SUBMITTED	TITLE	ORGANISATION	FUNDING CLUBS	FUNDED	REQUESTED	STATUS	ROUND ADMIN	RANKING	ACQUITTAL
206708	26/06/2022	Music for the children	ClubsNSW Org 1	ClubsNSW Club 1	\$9,000.00	\$12,000.00	✓	ClubsNSW Club 1		
206703	21/06/2022	Save the trees	ClubsNSW Org 1	—	\$0.00	\$33,000.00	★	ClubsNSW LGA 1	3 - High	
206698	20/06/2022	Sport for all	ClubsNSW Org 2	ClubsNSW Club 1	\$7,000.00	\$10,000.00	✓	ClubsNSW Club 1		
206695	20/06/2022	Training owners and their pets	ClubsNSW Org 1	ClubsNSW Club 1	\$2,000.00	\$2,000.00	✓	ClubsNSW Club 1		
prefix-1-suffix	15/06/2022	test	ClubsNSW Org 1	—	\$0.00	\$22.00	☰	ClubsNSW Club 1		
206665	14/06/2022	TESTTTTTTTTTTTTT	ClubsNSW Org 1	ClubsNSW Club 1, ClubsNSW Club 2	\$321.00	\$111,111.00	✓	ClubsNSW LGA 1		
206227	10/06/2022	Test	ClubsNSW Org 1	ClubsNSW Club 1	\$33.00	\$40.00	☰	ClubsNSW Club 1		

5.0 Expenditure Tab

5.1 How to add a manual expense/create new entry

- If your club or committee agreed to fund an application which wasn't received via the online system, a manual expense can be added here.
- Click on the 'Create New Entry' button.
- Enter the expense details.
- Click on the 'Create expenditure' button to add the expense.

5.2 Yearly expenditure

- Here you can access a list of your club's approved and manually entered allocations
- Click on the year to access that gaming year's information.
 - Grant Category: filter allocations by grant round.
- Click on the 'Request export' button to download an excel export of allocations.
- Your export has been queued and will be available shortly.

5.3 MAXsys End of Year Reporting (coming soon ...)

6.0 Your Emails Tab

6.1 How to select email template type

- Select an email template type from the drop-down list.
- Each email template can be customised with content, email replacement tokens and logos.
- After you customise and save your template, the system will automatically issue the relevant email once it has been triggered.
- If you do not wish to customise templates, the default templates will be sent.

6.2 How to use email replacement tokens

- Select an email template type from the drop-down list.
- Click on 'View email replacement tokens' to view available tokens.
- Replacement tokens can be used in the 'Template subject' and 'Template email body' fields.
- Copy and paste the email token into your custom email template to use the token.
 - Example: use *[club:name]* and *[expenditure:amount_funded]* to include the club name and the amount the club has funded an application.
 - *[club:name]* would like to congratulate you on your successful application for *[expenditure:amount_funded]*.

6.3 Automatic email triggers

- Trigger List:
 - From the Your Emails tab, scroll to the table below the 'Select email template type' filter to view a chart of automatic email triggers.
 - A description on when each automatic email will trigger can be found for each available email template.
 - Automatic emails cannot be turned off.