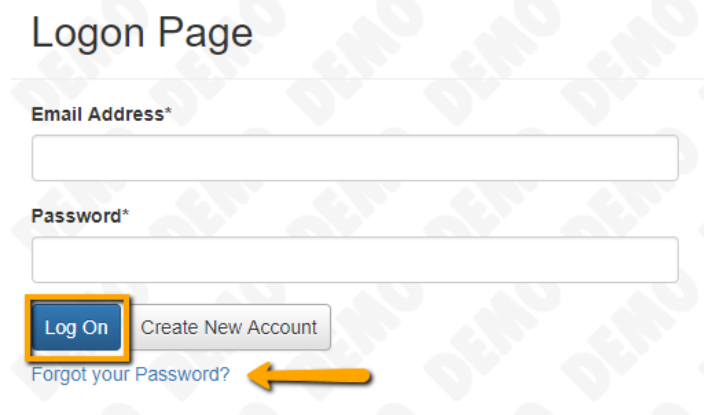**Logging In**

Once you've accessed the logon page, type in the username and password provided to you and click the Log On button.


- If you've forgotten your password, you can click "Forgot your Password?" to email yourself a reset link.
- DO NOT create a new account. This is for applicants only.

Edit Profile

Once logged in you land on your Dashboard. If you would like to edit your profile information or password select your name in the upper right hand corner.
- Next, click the Edit My Profile button.
- You can edit any of the fields shown,
- Or scroll to the bottom of the page and select **Change Password** button to set and confirm a new password.
  - Make sure to click the **Save** button once you have entered your new information.
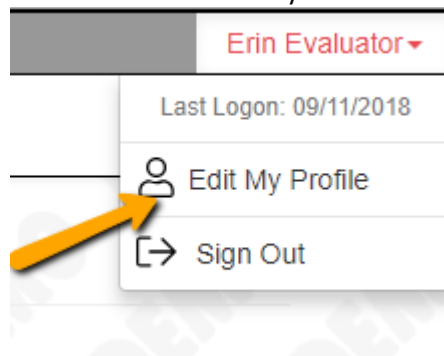
Navigation Menu
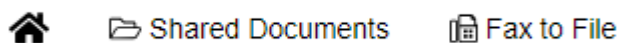
On the Dashboard your navigation menu includes:
- The **Shared Documents** page, which houses any files uploaded by an administrator.
  - This is a view only page. You may view documents but you may not upload or edit documents.

- The **Fax to File** feature can be used to convert documents from hard copy format to digital format so that they may be uploaded in the software.
- Lastly, the **HOME** icon in the navigation menu will return you to the dashboard from any other page.

Your Evaluations Dashboard

All of the assigned evaluations will be visible on your Dashboard under the "Your Evaluations" tab.

- At the top of the page, you will see a visual representation of the number of pending, draft, complete and closed evaluations.
  - Clicking on either section will filter the table below to only show evaluations with that status.

Pending	5	Draft	4	Complete		11	Closed	4

  - You can remove this filter by clicking that section again.
- Next, the quick search bar can be used to quickly find evaluations.
- Finally a table will show all of the evaluations that have been assigned to you. This table includes general information such as the Process and Applicants name.

FORM	PROCESS	ORGANIZATION	APPLICANT FIRST NAME	APPLICANT LAST NAME	PROJECT	SCORE	
Base Camp Example Process - Evaluation	Base Camp Example Process	Montana Community Organization	Molly	Applicant	Fall Grant For Book Funding	80%	✓

  - These columns can be sorted by clicking on the column header.
  - The **Score** is calculated by dividing the total points scored by the total points possible, and is based on the scoring questions you've completed thus far on the form.
    - If there are no scoring questions on the form, this column will be blank.
  - And the **Review** icon (in the farthest column to the right), which indicates if you have completed all of the required questions on the form:
    - A **red exclamation** point will appear if any required questions on the evaluation form have not been completed
    - A **green checkmark** appears after you have completed all required questions on the evaluation form.

Clicking on a request's status icon will bring you to the evaluation form to be completed.

Completing Evaluations

When clicked, the "**Review**" icon will direct you to the Evaluation page. This houses your evaluation form as well as other information.

- At the top of the page you can view the Process Name, Contact Information, and other important information pertaining to the Request.
- Next you will see **Your Evaluation** on the left side of the page.
  - You may create a PDF of the evaluation form with your responses by clicking on the "**Evaluation Packet**" button.

Your Evaluation

[PDF Evaluation Packet]

- To the right you will see the form (either LOI or Application) that was completed by the applicant.
  - You can toggle between the LOI and Application by clicking on the **View "Form Name"** drop down list at the top of the form.
    - Note this is only available for Applications with an attached LOI

View [Application ▾] ← [Document Viewer] [Application Packet]

  - If documents have been uploaded to the form, you can view these within the site by selecting the "**Document Viewer**" button.
    - This feature can also be accessed by clicking on the eye icon next to any uploaded document within the form
    - Within the document viewer you can page and zoom on documents, switch between uploaded forms, and download documents using the download icon.
  - If you would like to create a PDF of the application form with responses by clicking on the "**Application Packet**" button.

Finally, you can complete the evaluation form. You can scroll through the LOI and/or Application form as needed.

- Notice you can also see Administrator Comments on the Application or LOI form, when applicable.
- On the evaluation form, fields with an asterisk are required fields and must be completed.
- The system will automatically save your answers as you complete the evaluation form.
- You can use the vertical divider line between the evaluation and the application or LOI to resize each section.

Once you have completed the form click the "**Save**" button

- This will take you to a **confirmation page**.
  - Any **Required** questions that were not completed will be listed on this page.
    - Note that until all of the required questions are completed on the evaluation form, the status will not update from a red exclamation mark to the green checkmark icon.

Clicking **Next Pending Evaluation** will take the evaluator to next assigned evaluation.

[Return to Dashboard] [Next Pending Evaluation]

Clicking **Return to Dashboard** will take you back to your dashboard, where evaluation assignments are listed.

- If Scoring Questions are being utilized, the score total of all completed questions will appear as a percent in the Score column.

- You can return to a completed evaluation form and change your responses up until the time that the administrator closes the evaluation stage by clicking back onto the Review (pencil and paper) icon on the Evaluation workload page.

Logging out of the system
- To logout of the system click on your name in the top right-hand corner of the page and click "Sign Out".
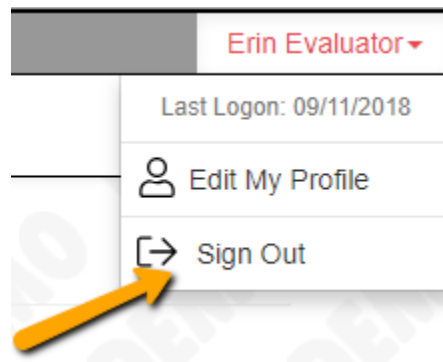
Key Points
- If you would like to edit your profile information or password select your name in the upper right hand corner.
- Clicking on any section of the Evaluation status bar will filter the table below to only show evaluations with that status.
- Clicking on a request's status icon will bring you to the evaluation form to be completed.
- Fields with an asterisk are required fields and must be completed for the status to be changed to complete.