How to Review Applications Via ZoomGrants™

Tips and Tools for Reviewing, Scoring, and Voting on Applications

Need a printer-friendly version?
https://zoomgrants.com/welcome/reviewerslideshowpf.pdf
Please consider sharing the link to this file instead of printing it.
Using the link will ensure you have the latest version of this guide
(and it'll save paper!).

Want to learn more? Go to http://help.zoomgrants.com/.

2 Quick Things to Know:

THE AUTO-SAVE FEATURE

ZoomGrants™ automatically saves your progress, so you can log out and log back in as many times as you need to in order to complete your review. Whenever you make a change in a field then click outside of that field (such as a Scoring Comment or My Notes) **or change your selection in a radio button or dropdown menu, you'll see a flash of the 'Saving' screen as your change is being saved.**

(Note: If you see the 'Saving' message for more than a few seconds your Internet connection may have blinked for a moment during the saving process and the change may not have been saved. Double click anywhere on the page to cancel the save and make a note of the change that you made. If you made the change in a text field, tweak the answer slightly, then click outside of the field to try the save again. If you selected a radio button or dropdown, select a different dropdown or radio button, wait for the save to occur, then make your original choice again. If you continue to have difficulty, check your Internet connection. You can also call our Technical Support team – (866) 323-5404 x2.)

THE TAB SYSTEM

ZoomGrants™ predominantly uses a tab system to set apart the different sections and features of the system. You can click on each tab to access the content housed there.

About This Tutorial:

To provide instructions for reviewing, scoring, and voting on Applications while also giving a tour of the ZoomGrants™ system, this tutorial uses two different colors to denote the different types of information provided.

ORANGE NUMBERS

These are **sequential instructions** that can be followed by users who just want to know how to review Applications via ZoomGrants™.

BLUE/GREEN LETTERS

These are **extra notes** regarding the ZoomGrants™ system and its features.

PART ONE:
Application Review –
Committee Members

MY ACCOUNT

In order to serve on a Review Committee, you must have a ZoomGrants™ account. The Program Administrator for the funding organization will set up your account using your email address and he or she will also create your password.

1. MY ACCOUNT

The My Account page provides quick access to all Programs to which you have been assigned.

2. PROGRAM DASHBOARD

Click an orange Program title or the Dashboard button to access that Program.

A. SEARCH

Use the Search field to quickly find Applications by entering part of the Application title, Application contact, etc. You will only be able to access Applications and Programs to which you have been assigned as a Funding Committee Member.

Welcome, Julie Doe   Not Julie Doe?

HELP   LOGOUT   A▲▼

ZoomGrants™

1 ...ous Foundation

| My Account | Program History | Announcements |

A Search   [Search]

My Account

Open Programs	Submitted	Incomplete	Total Awarded	
Grants Department				
Grants for People Seeking Grants	3	2	$ 100.00	Dashboard
12/31/2010 - 12/31/2020				
2016 Scholarship	4	2	$ 0.00	Dashboard
12/31/2008 - 6/15/2019				

Recently Closed Programs	Submitted	Incomplete	Total Awarded
none			

PROGRAM DASHBOARD – Quick Tour

1. QUICK ACCESS TABS

These tabs provide quick access to Application lists, the Scoring, Financial, and Reporting Reports, and the Data page.

2. MY DECISIONS*

Depending on the settings chosen by the Administrator, you may be assigned to review all or some specific Applications, or you may have access to all of the Submitted Applications.

Click the color-coded bars in the My Decisions section to view lists of Applications with the selected vote. *The screenshot to the right, for example, indicates that this Committee Member has voted to Approve several Applications, Decline several, and is still Undecided about one.*

To view a list of all of the Applications that you've been asked to read, click the View All button (**3**) at the bottom of the Applications section.

A. SEARCH

The Search field is here, too, but this time it will just search for Applications within this Program.

*This feature may not appear, depending on the settings chosen by the Administrator.

APPLICATIONS LIST – Navigation

1. OPEN AN APPLICATION

Click an orange Application title to open that Application to view the content.

A. SET FILTER*

Use these checkboxes to determine which Applications are included in the list.

B. MY SCORES*

As you score each Application, the My Scores column in the Applications list will display either a progress bar (if you are not finished assigning a score for *every* criterion) or the total score that you gave to that Application. This is another way to keep track of your progress.

C. SORT BY COLUMN

Click a bold column header to sort the Applications list by that column. Click again to reverse the sort.

READING APPLICATIONS – Navigation

ZOOMGRANTS UNIVERSITY

1. APPLICATION TABS

Click through the Application tabs to view the Application content.

2. REVIEW TOOLS

The Administrator may set up several helpful Review Tools – My Notes*, Discussion*, Internal Research*, Scoring*, and Decisions – that you can use as you work through the Applications. Click on the button to access those features.

A. QUICK ACCESS TABS

Use these tabs to quickly return to your other pages, including the Dashboard and the Applications list.

The Generous Foundation
Grants Department
Grates for People Seeking Grants
$ 10,000.00 Available
12/31/2020 Deadline

My Account | Dashboard | Applications | Scoring | Financial | Reporting | Data | Search | Search

Emily's Organization
My Application
$ 100.00 Requested

Print/Preview

Application | Application Summary | Pre-Application | Application Questions | Budget | Tables | Documents | Extra | Where did my tabs go?
Post-Decision | Funding Contract | Financial | Reports

Official Decision | ✔ Approved | $ | 100.00 | **Review Tools**

Application Questions

Demographic Information

1. If you were talking to a six-year-old, how would you describe your program?
Please limit the use of references to ice cream cones and trips to the pool, regardless of how well they relate to your program or the excitement induced by your program - children can be very excitable and we don't want anyone to be disappointed.

We will be working together, using teamwork and working as a team, to do really cool things and make people happier and healthier. There will be lots of smiles, and laughing, and fun, even though we will be also be doing our best and working hard.

2. How many people of each age group will be able to participate in your program?

500	Young People
500	Young-at-Heart People
1,000.00	**TOTAL**

3. What two (2) are the main goals of your program?

READING APPLICATIONS – Scoring*

1. SCORING*

Click into the Review Tools to view and the scoring criteria set up by the Administrator and to select your scores for the Application.

2. SCORING QUESTIONS*

The Administrator creates Scoring Questions based on relevant criteria. For each question, select a score in the Score dropdown. If applicable, you can also enter a Comment on each Scoring Question.

3. MY SCORING COMMENTS

Add general comments regarding your applied scores in the My Scoring Comments box at the bottom of the Scoring* section.

A. ADMINISTRATIVE SCORING QUESTIONS*

Some funders choose to set up separate Committee and Administrative Scoring Questions*. Administrative Scoring Questions* can only be completed by Administrative users.

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.

READING APPLICATIONS – Decisions*

1. MY DECISION*

Once you've completed your Review, you may cast your vote at the top of the Review Tools. If you vote to Approve an Application, be sure to enter the Recommended Amount, too (**A**).
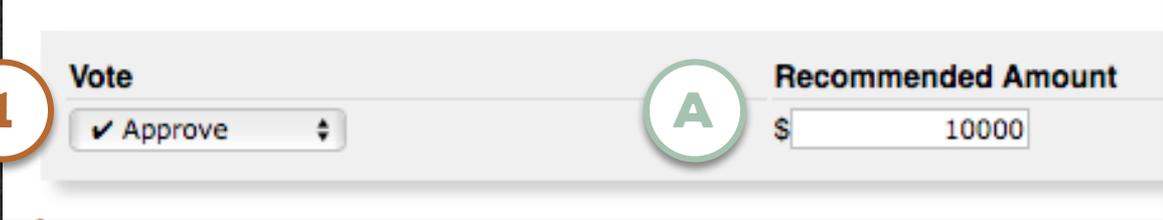
1

Vote

✔ Approve ⬍

A

Recommended Amount

$ 10000

READING APPLICATIONS – Scoring Report*

1. SCORING REPORT*

Click the Scoring tab in the Program-level tabs to view your Scoring Report. Within the Scoring Report, you can view all of your Votes and Scores for all of the Applications to which you have been assigned.

A. CHANGE YOUR VOTE

Use the My Vote dropdown* and the My Recommend* box to change your decision or funding suggestion.

B. SORT BY COLUMN

Click a bold column header to sort by that column. Click again to reverse the sort order.

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.

READING APPLICATIONS – Data

1. DATA

Click into the Data tab in the Program-level tabs to generate customized reports to use as you compare applications and make your considerations.

2. CUSTOM DATA REPORT

1. Set a Filter – Choose which Applications you'd like to include in the Report.

2. Choose a View – Tell the system how you would like the results presented.

Please note: some fields (such as Tables) are limited to select views.

3. Select the Fields – Scroll down and click the checkbox(es) next to the field(s) that you'd like to include in the Report (**A**).

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.

TECHNICAL QUESTIONS?

We're always happy to help.

Send us an email: Questions@ZoomGrants.com

Give us a call: (866) 323-5404 x2

PART TWO:
Application Review –
Committee Chairs

Committee Chairs:

Committee Chairpersons are a hybrid of

... NORMAL COMMITTEE MEMBER

Committee Chairs review, score, and vote on Applications just as normal Committee Members do.

... AND PROGRAM ADMINISTRATOR.

In addition to reading Applications as Committee Members, Committee Chairs also have limited Administrative authority.

COMMITTEE CHAIRS CAN:

- Change Trial Decisions and Amounts
- Assign Custom Statuses
- Pose Follow-Up Questions via the Activity Log
- Email Applicants
- View Committee Totals and Averages in the Scoring Report

COMMITTEE CHAIRS CANNOT:

- Change Official Decisions and Amounts
- Change the Pre-Application status
- Assign Applications to Committee Members
- Enter Administrative Scores or Comments
- Open Applications for Editing
- View Specific Scores or Comments of other Committee Members
- Manage any Post-Funding Activities

Want to learn more? Go to http://help.zoomgrants.com/.

COMMITTEE CHAIR – Trial Decisions

1. COMMITTEE VOTES

For an individual Application, normal Committee Members can only cast their own votes and enter their own Recommended Amount. **Committee Chairs can also view the votes and average approval amounts for the entire committee.**

2. TRIAL DECISION

Committee Chairs can also change the Trial Decisions and Amount. Trial Decisions and Amounts can be used to try out multiple funding scenarios during committee meetings. Trial Decisions can be changed in the Decisions tab of an individual Application or in the Scoring Report (**A**).

COMMITTEE CHAIR – Custom Status*

A. CUSTOM STATUS*

Each Application can be marked with one or two Custom Statuses set up by the Administrator. Committee Chairs can change the Custom Status* of any Application. Click into the Application Summary tab to change the Custom Status fields in the Settings section.

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.

COMMITTEE CHAIR – Follow-Up Questions

A. ACTIVITY LOG

Committee Chairs can pose follow-up questions to specific Applicants by adding an activity to the Activity Log in the Application Summary tab.

B. ADD A NEW ENTRY

Use the Add a new entry to Activity Log section at the bottom of the tab to pose the question by selecting the 'Applicant Action Requested' option, typing your question in the description box, and clicking Add Entry. An email will be sent to the Applicant, who will be able to log in to respond to the question in the Activity Log. (C) shows how the question appears once it has been added as an Activity Log entry.

Add a new entry to Activity Log
- ○ Applicant action requested
- ○ Administrator action requested
- ○ Administrator action completed
- ● Other

Describe your request or action

Add Entry

Audit Log View/Hide

8/7/2015 8:16:26 AM (Julie Doe) Applicant action requested: Please answer this question : How many volunteers have already signed up to help with your program in July?

COMMITTEE CHAIR – Email Applicants

A. SEND EMAIL TO SELECTED

Committee Chairs can send emails to groups of Applicants from the Applications list. Check the box(es) next to the Applicant(s) to whom a message should be sent, then click the Send Email to Selected button to open up the Send Message window (**B**).

B. SEND MESSAGE WINDOW

Message text can be based on one of the pre-populated templates set up in the Messages tab by the Administrator. Merge Fields can be added to customize each message.

COMMITTEE CHAIR – Scoring Report*

A. SCORING REPORT*

Click the Scoring* tab in the Program-level tabs to access the Scoring Report*.

B. REPORT TYPE

From the Report Type dropdown in the Scoring Report* select any available view. In addition to viewing their own individual Scores and Votes, Committee Chairs can also view the Committee Totals and Averages. Trial Amounts and Decisions can also be edited in the Scoring Report*.

*This feature may not appear, depending on the settings chosen by the Administrator.

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