

THE CONRAD PREBYS FOUNDATION

Grantee Webinar

Winter 2022 Grant Cycle

Updating Organizational Contacts

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

Contracting

- Standard & Medical Research Grant Agreements
- Capital Campaign Grant Agreements
- Deadline for Signed Grant Agreements: March 4

Navigating the Grant Portal

THE CONRAD PREBYS FOUNDATION

Account: [REDACTED] Change E-mail/Password Contact Us | Exit
Last Log in: 9/3/2021 6:06 PM GMT-04:00

Applications Requirements

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.

Show **In Progress Applications** ▼
 Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
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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 already initiated
- Bill.com PNI & Connection Pending
 - Invitation 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
The Conrad Prebys Foundation has invited you to receive payment



Already have a Bill.com account? [Sign in here](#)

Create an account to receive your USD

First name * Last name *

Email

Password *

- Use upper and lower case letters
- Use a number or symbol
- Use 8 or more characters

Creating an account means you agree to the [Bill.com General Terms of Service and Privacy Notice](#), and agree that this account will not be used for primarily personal, family, or household purposes.

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What's your relationship to The Conrad Prebys Foundation?

This will help make sure you get paid properly.

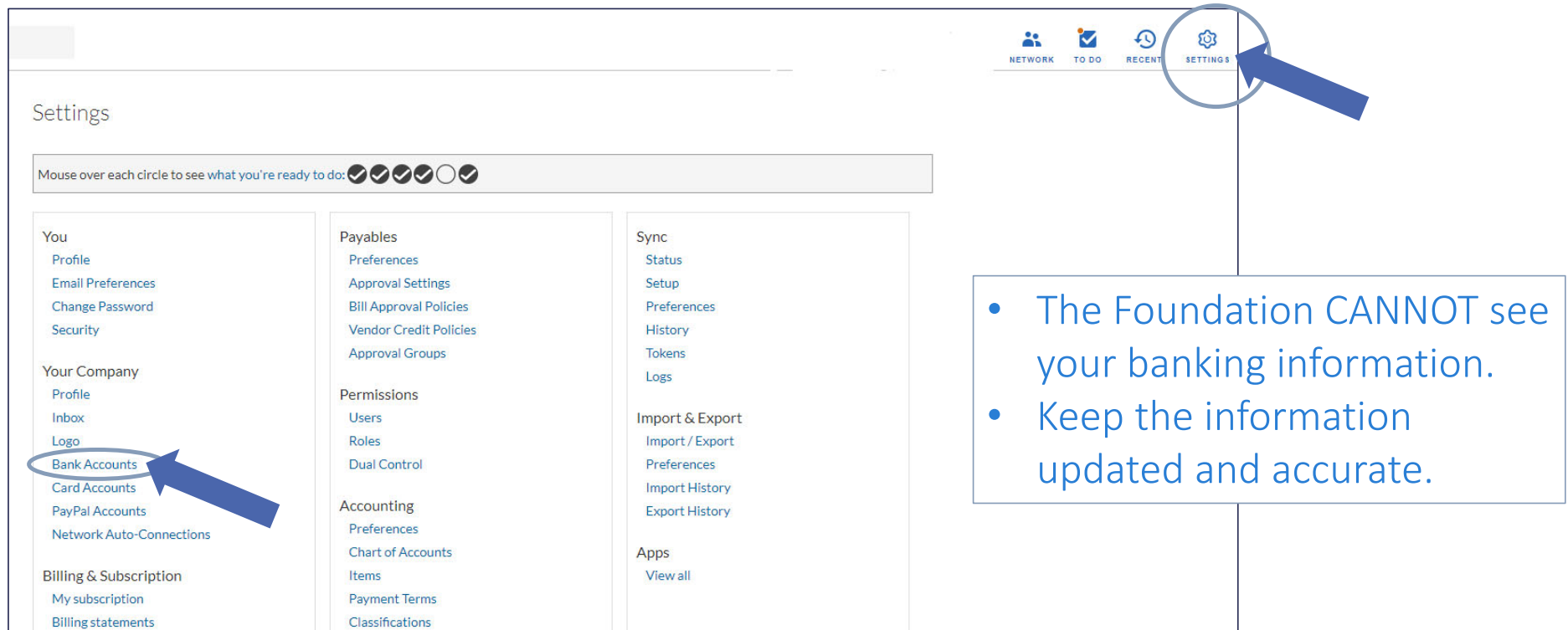
I'm with a business
You are a separate business getting paid by The Conrad Prebys Foundation.

I'm an independent contractor
You are a 1099 or similar being paid by The Conrad Prebys Foundation.

I'm an employee
You are a W-2 employee of The Conrad Prebys Foundation.

I'm none of the above

Bill.com Account Set Up (CONTINUED)



The screenshot shows the Bill.com Settings page. In the top right corner, there are navigation icons for NETWORK, TO DO, RECENT, and SETTINGS. The SETTINGS icon is circled in blue, with a blue arrow pointing to it. Below the navigation bar, the page title is 'Settings'. A progress bar indicates that five out of six setup steps are complete. The main content area is divided into three columns: 'You', 'Your Company', and 'Billing & Subscription'. Under 'Your Company', 'Bank Accounts' is circled in blue, with a blue arrow pointing to it. A text box on the right contains two bullet points: 'The Foundation CANNOT see your banking information.' and 'Keep the information updated and accurate.'

Settings

Mouse over each circle to see what you're ready to do:

You

- Profile
- Email Preferences
- Change Password
- Security

Your Company

- Profile
- Inbox
- Logo
- Bank Accounts**
- Card Accounts
- PayPal Accounts
- Network Auto-Connections

Billing & Subscription

- My subscription
- Billing statements

Payables

- Preferences
- Approval Settings
- Bill Approval Policies
- Vendor Credit Policies
- Approval Groups

Permissions

- Users
- Roles
- Dual Control

Accounting

- Preferences
- Chart of Accounts
- Items
- Payment Terms
- Classifications

Sync

- Status
- Setup
- Preferences
- History
- Tokens
- Logs

Import & Export

- Import / Export
- Preferences
- Import History
- Export History

Apps

- View all

- The Foundation CANNOT see your banking information.
- Keep the information updated and accurate.

Bill.com Account Confirmation in Grant Portal

- Complete Account Set Up
- 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 **MARCH 4, 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
- 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](#).

MINIMUM SIZE REQUIREMENTS AND CLEAR SPACE



CLEAR SPACE = 75% OF HEIGHT

MINIMUM SIZE = .25"

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.

Contact Information

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Questions?