



The **COMMUNITY** Foundation *for* Greater New Haven
NOW MORE THAN EVER

REVIEWER GUIDE

NEIGHBORHOOD LEADERSHIP PROGRAM

Table of Contents

Introduction	3
Log in	4
Dashboard	5
Reviewing an Application	6
Viewing Feedback after Review	8

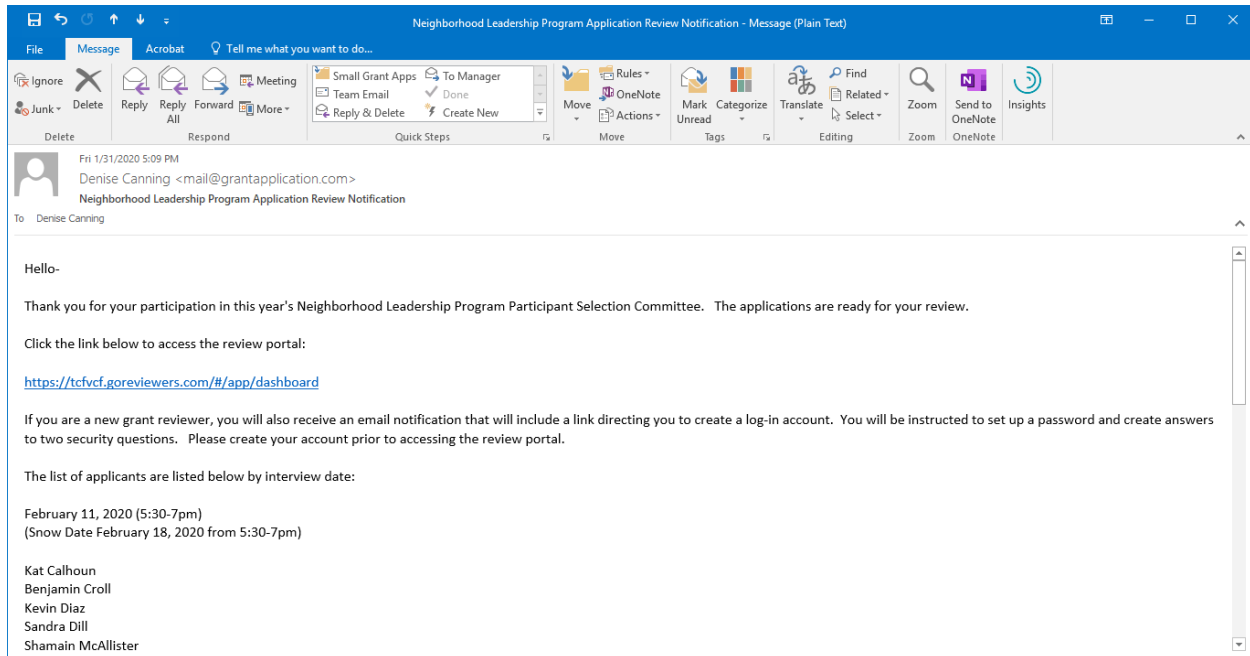
Introduction

The Blackbaud Grantmaking Reviewer Portal gives you the ability to review pending grant proposals online.

As a Reviewer, you will be able to log in with a personalized account to review a Neighborhood Leadership Program Application and provide feedback.

Log in

As applications for review become available, you will receive an email notification that will include a link directing you to the reviewer portal where you will need to enter your current username and password to access the applications.

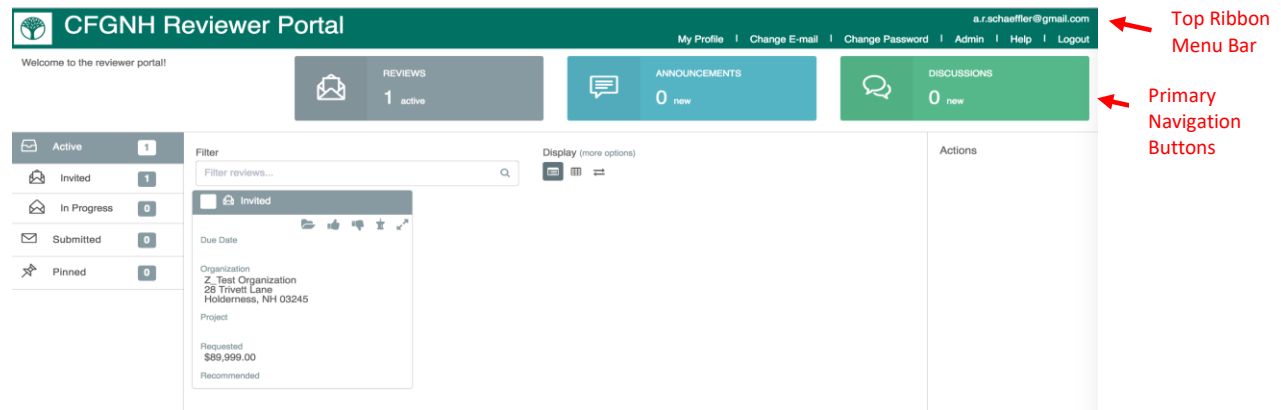


If you are a new grant reviewer, you will be instructed to set up a password and create answers to two security questions.

If you request a new password and don't receive one through the automated system, please check to make sure the email did not go to your junk mail. You may need to manually authorize the website (tcfvcf.goreviewers.com) as a safe site in your email settings.

You can also access the Reviewers Portal at anytime though: <https://tcfvcf.goreviewers.com/>

Dashboard



Top Ribbon Menu Bar

The top ribbon menu bar allows you to change your E-mail, change your password and logout. To return to the main dashboard, select the logo in the upper left hand corner on any page.

Primary Navigation Buttons

The primary navigation buttons are at the top of the page. **Reviews** (grey box) displays your active reviews and **Announcements** (blue box) displays information from the Foundation. **Discussions** allows you to see comments left by other reviewers.

Left-hand Column

The Left-Hand Column displays information about your reviews. Use these buttons to move from your **Active**, **Invited**, **In Progress**, **Submitted**, and **Pinned** reviews.

Active	1
Invited	1
In Progress	0
Submitted	0
Pinned	0

- **Active** – Combined total of Invited and In Progress queue
 - **Invited** – To be acknowledged as accepted or denied
 - **In Progress** – Currently being worked on
- **Submitted** – Completed reviews
- **Pinned** - Pinning allows you to have quick access to specific reviews

Center Column

Filter, View, Sort and Display Options

The options to Filter and Sort have drop-down menus to choose the information that is displayed on the page. The View option may allow some customization based on the grant makers preference.

- **Filter** – Keyword search through displayed records
- **View** – Pre-defined sets of fields displayed in the review records
- **Sort** – Pre-defined sortable values from the views
- **Ascending/Descending** - Sortable views

Reviewing an Application

View Application

Click the Folder icon on the left of the in progress proposal to open the Application.

The screenshot shows the CFGNH & VCF Reviewer Portal interface. The top navigation bar includes the portal name, user email (dcanning@cfgnh.org), and links for My Profile, Change E-mail, Change Password, Admin, Help, and Logout. The dashboard features three main sections: REVIEWS (3 active), ANNOUNCEMENTS (0 new), and DISCUSSIONS (0 new). On the left, a sidebar lists application statuses: Active (3), Invited (0), In Progress (3), Submitted (6), and Pinned (0). The main content area displays a list of 'In Progress' applications. The first application, 'Shamain McAllister', is highlighted with a red circle around its folder icon, indicating where to click to view the application details.

Filter	Display (more options)	Actions
Filter reviews...	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
In Progress	In Progress	In Progress
Due Date	Due Date	Due Date
Organization Individual Grants	Organization z-Jensen Animal Shelter TEST TEST, CT 06511	Organization z BBGM Test Organization 123 Test St New Haven, CT 06510
Project Shamain McAllister	Project	Project TEST
Requested \$0.00	Requested \$500.00	Requested \$7,500.00
Recommended	Recommended	Recommended

Once open, on the left side of the screen, you will see the following:

Go To Menu:

This allows you to quickly jump to different sections within the review. The options here will vary depending on the grant program that you are reviewing.

Related Menu:

Discussions: Access the Discussions that may be occurring among other reviewers of this application.

Documents: You may access the related documents that are included as part of this proposal (such as the application, budget, etc) by clicking “Documents”.

On the right side of the screen you will see an **Actions Menu** with the following options:

- View Request: Click to view the application sent by the applicant.
- Submit: Click to Submit your review once it is complete
- Send to PDF: This allows you to send your review and it’s attachments to a PDF file for your own records.
- **Email (Staff Member): This allows you to email the staff member that has assigned this review to you any questions pertaining to the proposal. All questions must be asked before submitting your recommendation (step 2 below).**

Options at the bottom of the review screen:

- Save & Close – Save your changes and return to the home page
- Save – Saves changes but keeps the record open
- Cancel – Discards unsaved changes and returns to the home page

After reviewing the application, you are able to write notes in the Feedback section at the end of the application.

The screenshot shows a web browser window with the URL <https://tcfvfcfgreviewers.com/#/app/review/index?id=319&tid=8c4735dfcccd44a99eb0801a6c5de574>. The page title is "CFGNH & VCF Reviewer Portal". The user is logged in as "dcanning@cfgnh.org". The page is titled "Review - Individual Grants" and shows "In Review as of 2/3/2020".

The main content area is divided into three sections:

- Go to:** Review, Applicant, Request, Feedback
- Related:** Discussions, Documents
- Feedback:** A text box for "Notes" and a "Feedback" section with a text area and a "Save & Close" button.

The right sidebar contains the following actions:

- ★ View Request
- ✓ Submit
- 📄 Send to PDF
- ✉ E-mail Denise Canning

At the bottom of the page, there are three buttons: "Save & Close", "Save", and "Cancel".

Click **Save & Close** button at the bottom of the page to return to the main dashboard to get to the next applicant.

Viewing Feedback after Reviewing

You can re-open the application at any time to access your ratings and feedback. If you would like a hard copy to refer to during the interviews, you can click Send to PDF on the right side of the screen and print it off.

Please feel free to contact Denise Canning at dcanning@cfgnh.org with any questions or issues.

DISCLAIMER: ALL grant and scholarship information on this portal is considered confidential. Please do not share this information with anyone outside the Foundation. If you download materials from this portal to your personal computer, please make sure to delete such files after grant and scholarship decisions have been made.