

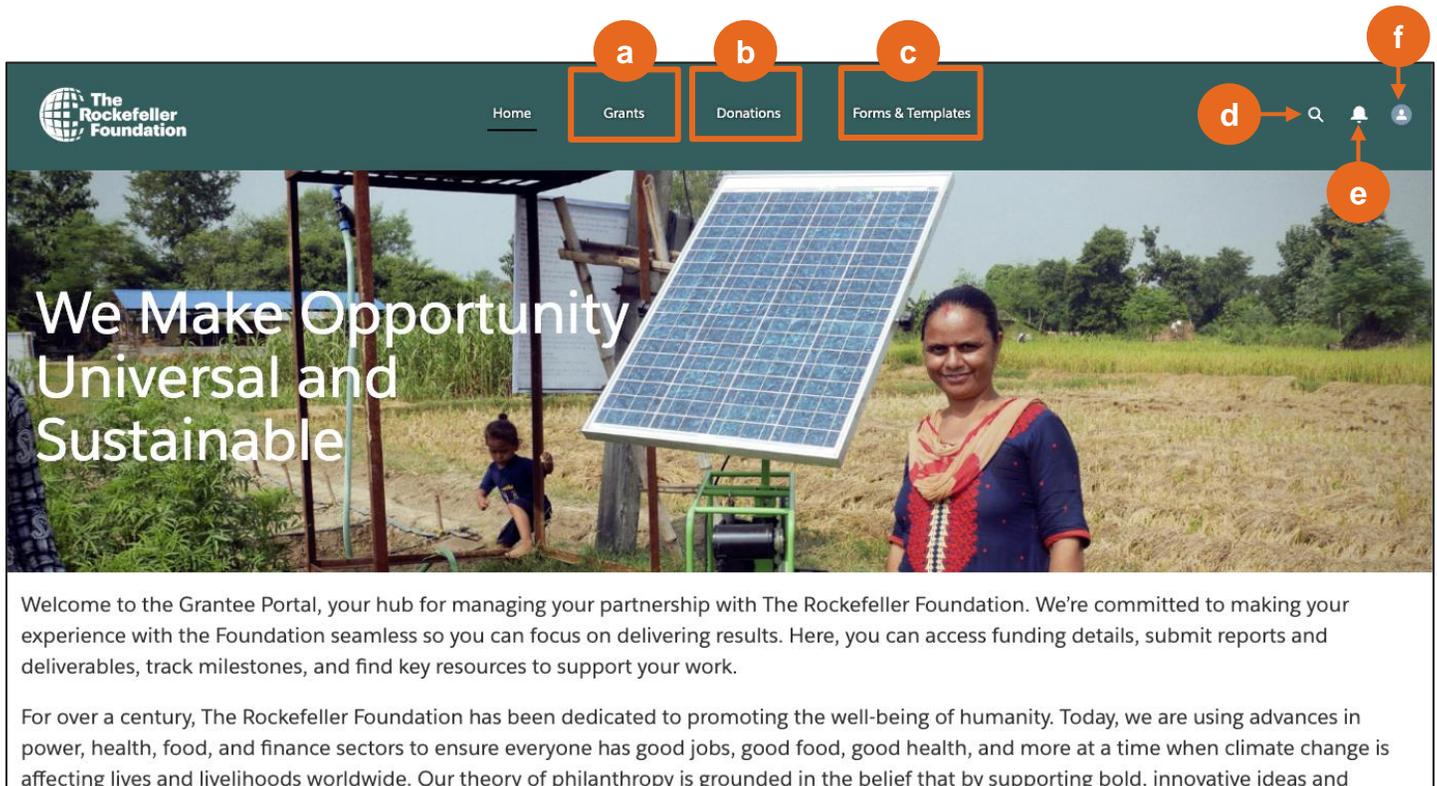


Portal User Guide: General Portal Overview

This user guide provides an overview of the essential features you'll encounter upon logging into the Portal. It also includes a sample layout of your Homepage, how to view Funding Awards and Requirements, and guidance on how to request Portal support.

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1.0 Homepage Layout



- a Grants Tab:** Access Grants visible to you and other members of your Organization who are part of the designated Funding Opportunity Team, as determined by RF. From this tab, you can navigate to submit Requirements such as the Pre-Grant Questionnaire and Deliverables.
- b Donations Tab:** Access Donations visible to you and other members of your Organization who are part of the designated Funding Opportunity Team, as determined by RF.
- c Forms & Templates Tab:** Access links to essential forms and templates, including Rockefeller Foundation Policy Guidance, Proposal Development templates, Grant Award Process instructions and forms, and Reports and Deliverables guidance and templates.
- d Search:** Search for any Funding Award.
- e Notifications:** View pending alerts related to Funding Awards.
- f Settings:** Update your Profile or Account settings, easily navigate back to the homepage, or log out.

2.0 View Your Funding Award

- a** Navigate to your **Grants Tab** or **Donations Tab** to view your Funding Awards.
- b** Click the **hyperlinked Award link** that you want to review in further detail.

The screenshot shows the top navigation bar of the Rockefeller Foundation portal. The 'Grants' tab is highlighted with an orange box and a circled 'a'. Below the navigation bar, the heading 'Review Awards Listed Below' is centered, with a note: 'You will see a blank page if no Awards exist.' Below this is a table titled 'GRANTS' with columns for Name, Status, Amount, and Start Date - End Date. The first row of the table is highlighted with an orange box and a circled 'b', indicating the award link to be clicked.

Name	Status	Amount	Start Date - End Date
FO-Grant-0000204 Award	In Process	\$30,000.00	2/26/2025 - 6/27/2025
FO-Grant-0000419 Award	Open	\$110,000.00	3/21/2025 - 2/27/2026
FO-Grant-0000484 Award	In Process	\$123,000.00	3/27/2025 - 8/21/2025



3.0 Navigate Through your Funding Award

The screenshot displays the Rockefeller Foundation's portal interface for a specific funding award. At the top, a dark green navigation bar includes the foundation's logo and menu items: Home, Grants, Donations, and Forms & Templates. Below this, a white header area shows the award title 'Funding Award FO-Grant-0000204 Award' and a 'Request Technical Support' button. The main content area features a horizontal tabbed interface with five tabs: 'Details', 'Requirements', 'Disbursements', 'Amendments', and 'Team'. Five orange callout boxes labeled 'a' through 'e' are positioned over these tabs. Below the tabs, the 'General Grant Information' section is expanded, displaying a grid of key-value pairs for various award details. The 'Contacts' section is also expanded, showing contact information for the grant manager and responsible associate.

General Grant Information	
Name	FO-Grant-0000204 Award
Status	In Process
Awardee	American Society for the Prevention of Cruelty to Animals
Start Date	2/26/2025, 12:20 PM
Amount	\$30,000.00
End Date	6/27/2025, 12:20 PM
Paid Amount	\$0.00
Formal Purpose Statement	Support ASPCA Hurricane Response & Relief Grants Initiative
Funding Opportunity Record Type	Grant
Award Number	

Contacts	
Responsible Officer	Grant Manager
Responsible Officer	Grant Manager
Responsible Officer Email	Grant Manager Email
	c-ncapustin@rockfound.org
Responsible Associate	
Responsible Associate	
Responsible Associate Email	

Note: Tabs for Grant and Donation Funding Awards vary.

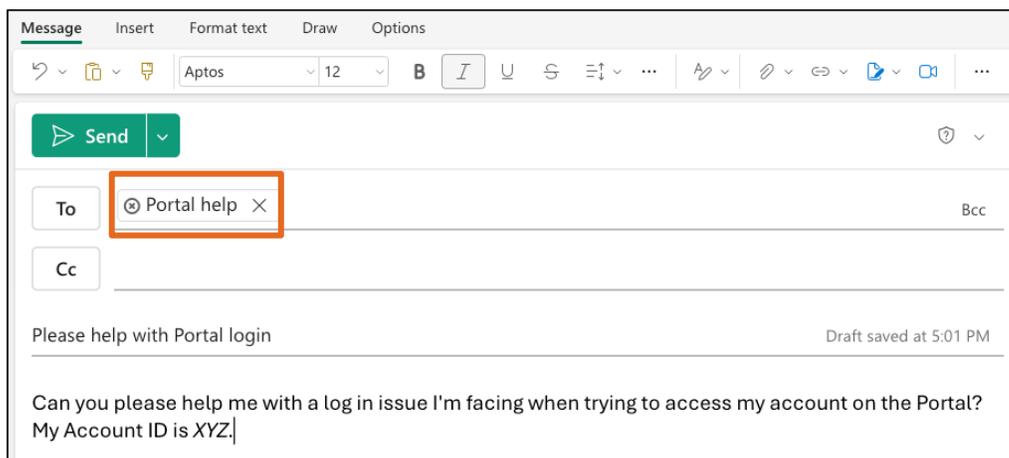
- a Details Tab:** Contains key information about the Grant, such as the Purpose Statement and RF Contacts.
- b Requirements Tab:** Displays the status of each Requirement and place to upload to upload/submit Requirements.
For more information about submitting Requirements, view the [Submit a Requirement](#) user guide.
- c Disbursements Tab:** Shows details on Disbursements, including status, amount, and other relevant information.
- d Amendments Tab:** Displays Amendment type and status.
- e Team Tab:** Displays your Organization's Contacts associated with the Funding Award

4.0 Request Portal Support

There are two ways to request Portal support – you can either (1) email the Portal support team directly for assistance, or (2) request support on a specific Funding Award through the Portal. Both processes are outlined below.

OPTION 1: Email the Portal Support Team

Email portalhelp@rockfound.org describing your issue. Your case will be addressed by the Portal Help team who will respond via email. Please include your Funding Award name and any other relevant details (e.g., FO-Grant-##### Award) in the message to help the support team quickly address your request for support.



OPTION 2: From a Funding Award in the Portal

Navigate to the Funding Award on the Portal where you are experiencing a challenge and click **Request Technical Support** on the right-hand side of the screen.

Note: Your help request will be linked to this specific Funding Award when reviewed by the support team.

