Logging onto the Grants Portal

1. Go to our website www.oct.org.nz.

2. On the Home page, click on the yellow button 'Enter Grants Portal'.

Existing User

3. Use the email address or your firstname_lastname that was set up as your log in.

- **If you do not know your password, you can click on 'Reset or New Password'.**
- **You will receive an email with a link for you to set up your password.**

New User

If your organisation has never applied to Otago Community Trust before, first ensure that your organisation is eligible for a grant from the Trust. Our website has clear information on [Who we Fund](#), [What we Fund](#), [How we Fund](#) and [What we do not generally fund](#).

In order to be considered for funding we need to know a little more about your organisation; please complete our New Organisation Eligibility Quiz. If you are eligible you will be taken to our Registration Form. Please complete all the questions and submit your request.

It is important to note that there is no save option at this stage of the registration process you need to fully complete this step.

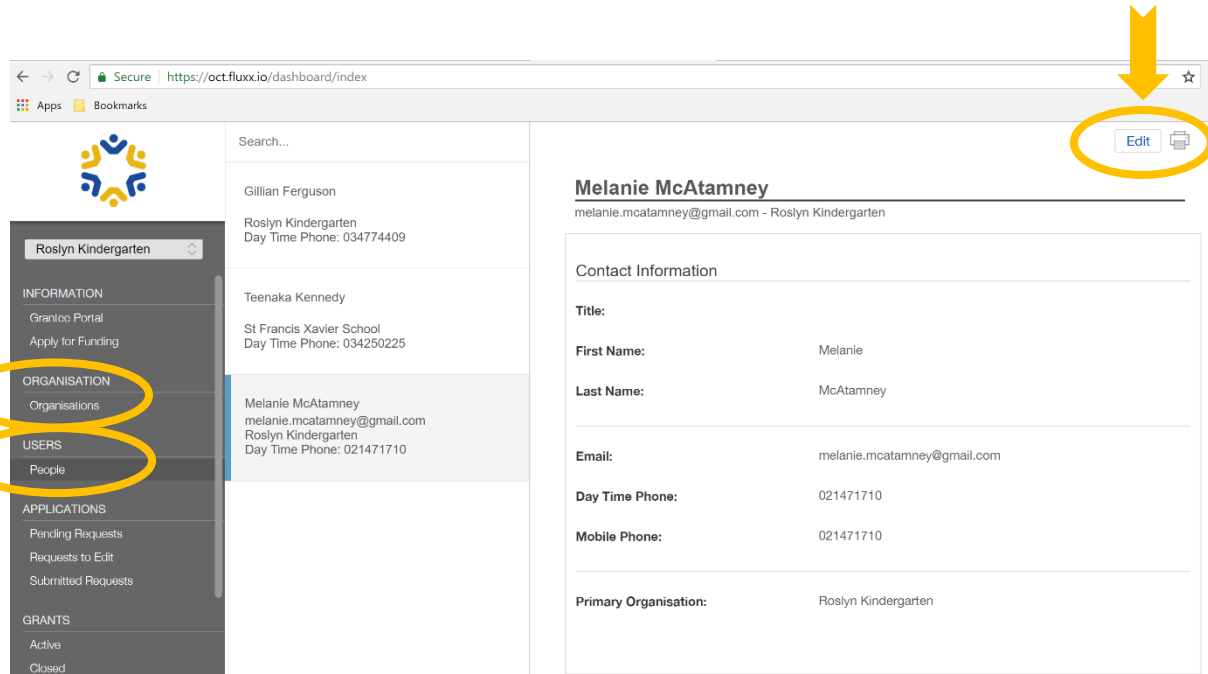Your New User log-in details will be emailed to you.
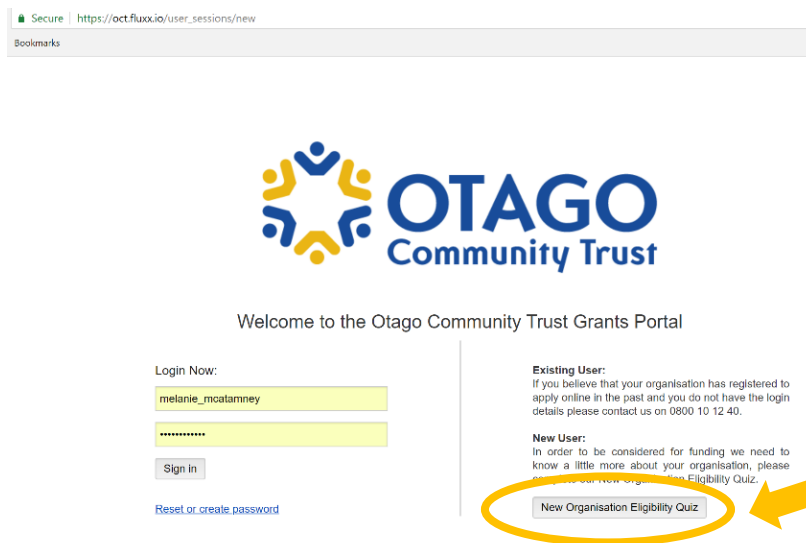
4. **Once you have your login details, you can login to the Grants Portal. Upon logging-in, you will see the organisation's name in the top left-hand side. If you are associated with more than one organisation you will need to select the organisation you wish to submit a grant for – click on the small downward arrow ⌄ to view all organisations.**
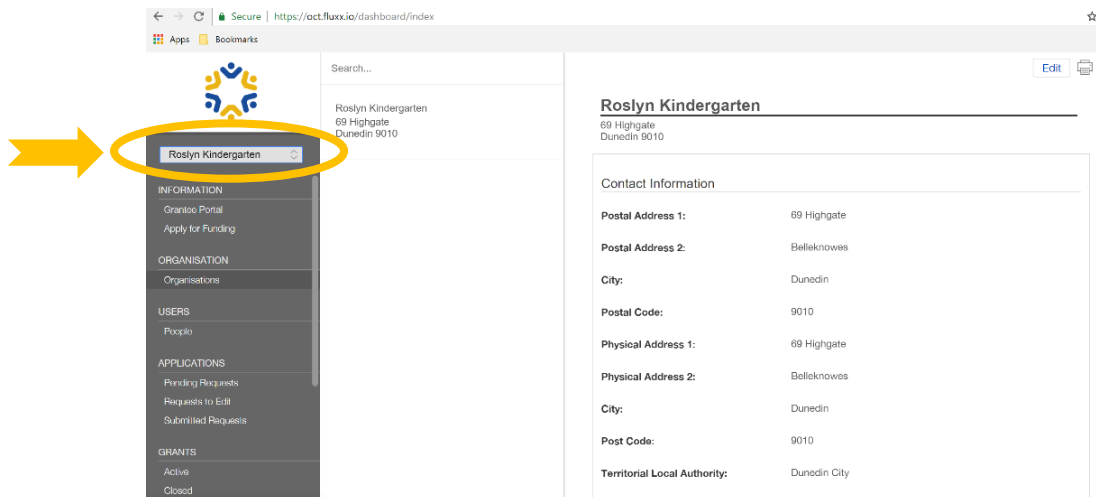
5. This is where you can update your own information under 'People' and your organisation details under 'Organisation'.

Note: You cannot remove users from the people card, however you can update phone numbers and email details here. In the Organisation card you can assign the correct 'Primary Contact'.
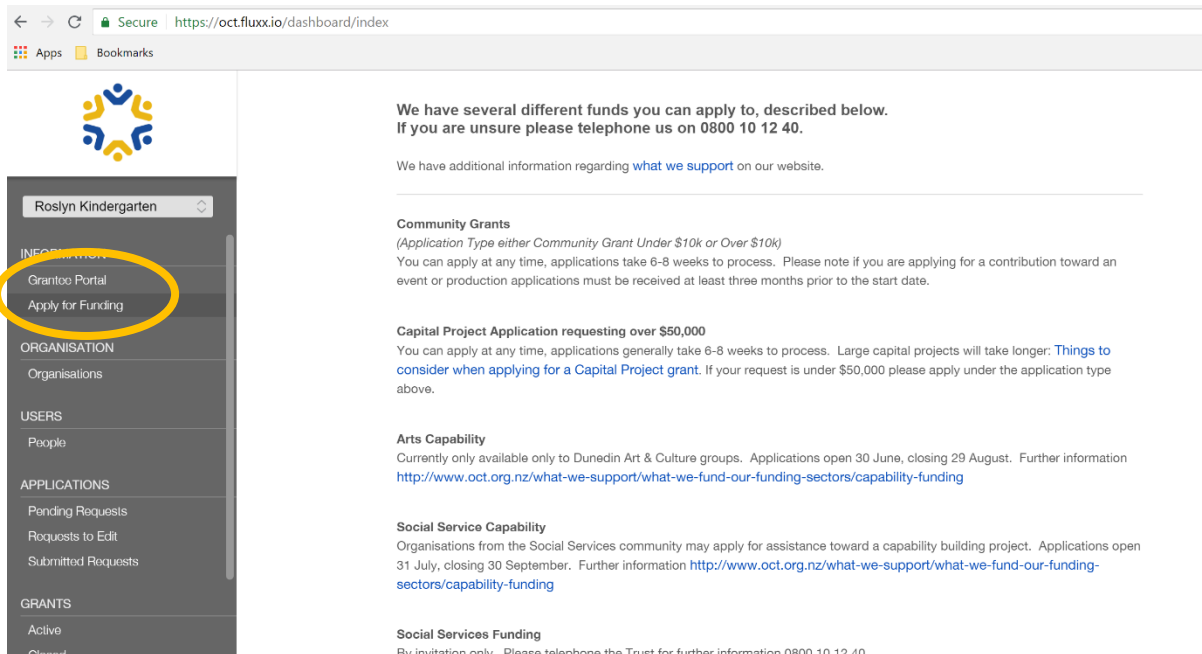
Apply for Funding

1. Down the left hand side in the grey panel, click on Apply for Funding.

2. There are various application types that can be selected. After reading and confirming the type of application that best fits your project, scroll to the bottom of the page and click on 'Apply for Funding' button.

3. Select your Application Type and answer the questions requested, remembering to save regularly so that you can come back to it at a later date if need be.

If you have started an application but not completed it, you can find that in 'Pending Requests' under the Applications tab.

4. At the end of the application you will need to provide 'Supporting Documents' – these can be uploaded by clicking on the '+' button.

Please upload the following documents in support of your application:

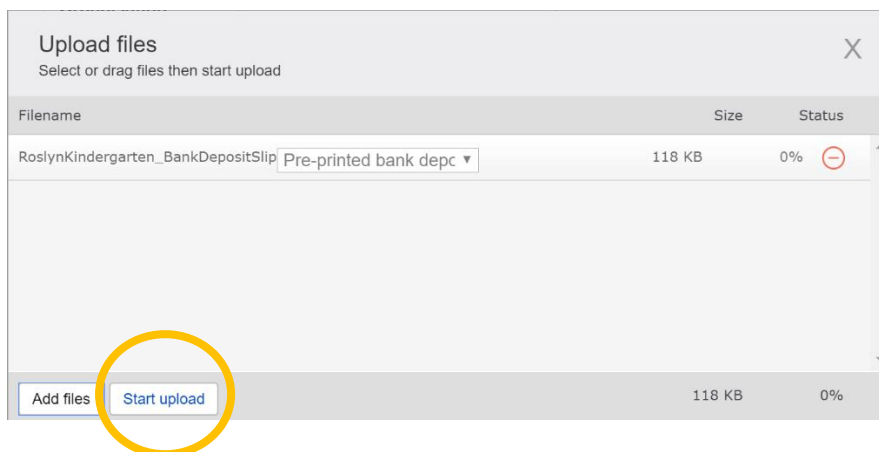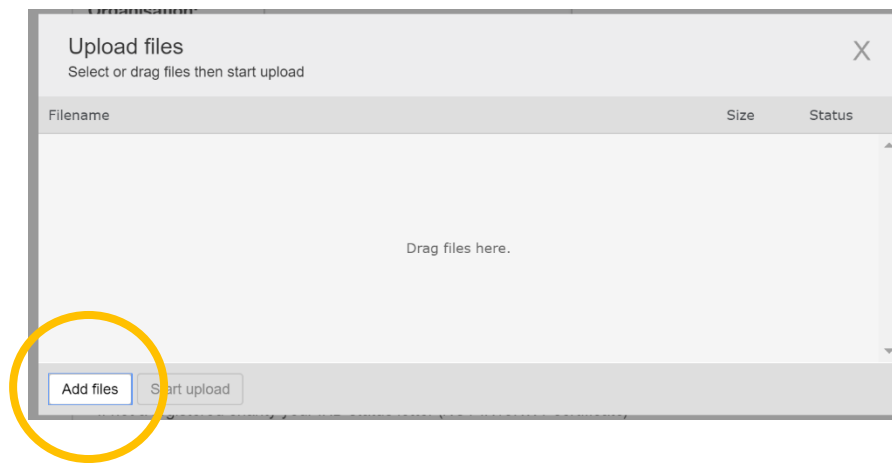Pre-printed bank deposit slip or bank verified account details.

Most recent Annual Financial Statements incld the audit or review report, these must not be more than 18 mths old

Most recent bank statement for all bank accounts held, including investments
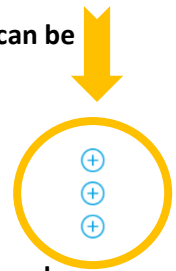
At the very minimum the Trust will require the following, so you should have these saved and ready to upload:

1. **Pre-printed bank deposit slip or bank verified account details.**
2. **Most recent Annual Financial Statements including the audit or review report, these must not be more than 18 months old**
3. **Most recent bank statement for all bank accounts held, including investments**

Upload files
Select or drag files then start upload

Filename	Size	Status

Drag files here.

Add files   Start upload

Upload files
Select or drag files then start upload

Filename	Size	Status
RoslynKindergarten_BankDepositSlip Pre-printed bank depc ▼	118 KB	0% ⊖

Add files   Start upload   118 KB   0%

Supporting Documents ⊕

📄 RoslynKindergarten_BankDepositSlip.pdf
Pre-printed bank deposit slip or bank verified account details.
Added by Melanie McAtamney at 1:52 PM on 17 September 2018

5. Additional Supporting Documents – Some applications like Capital Project will require additional information. Select from the drop-down list what the uploaded document is so that the portal recognises that you have uploaded the correct documents.
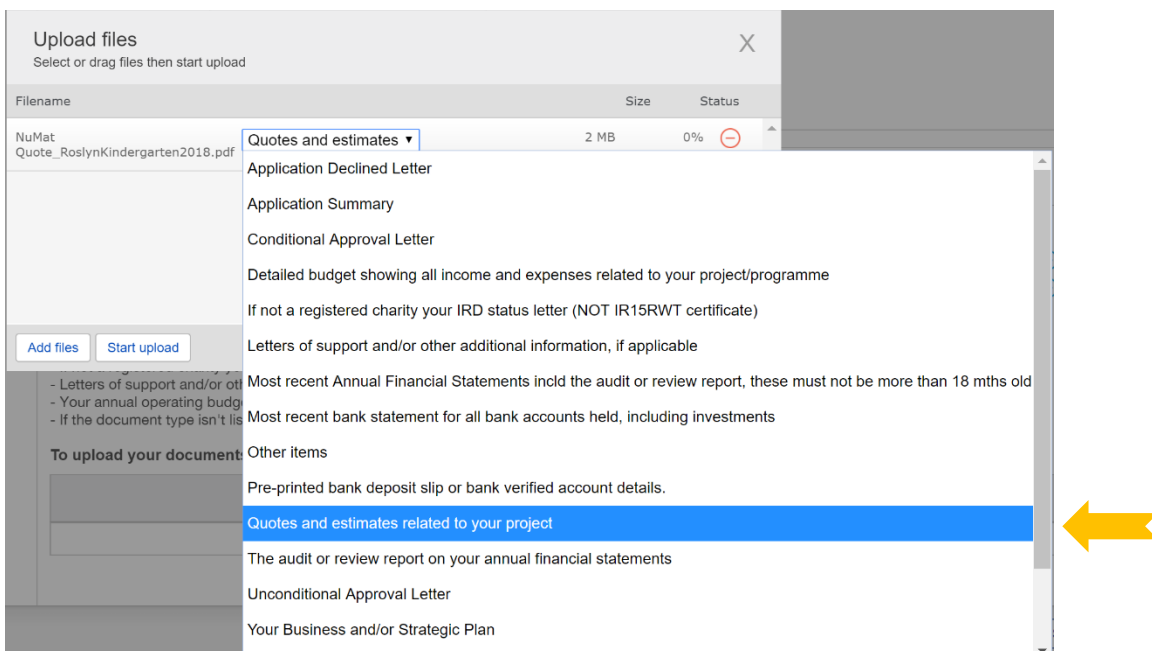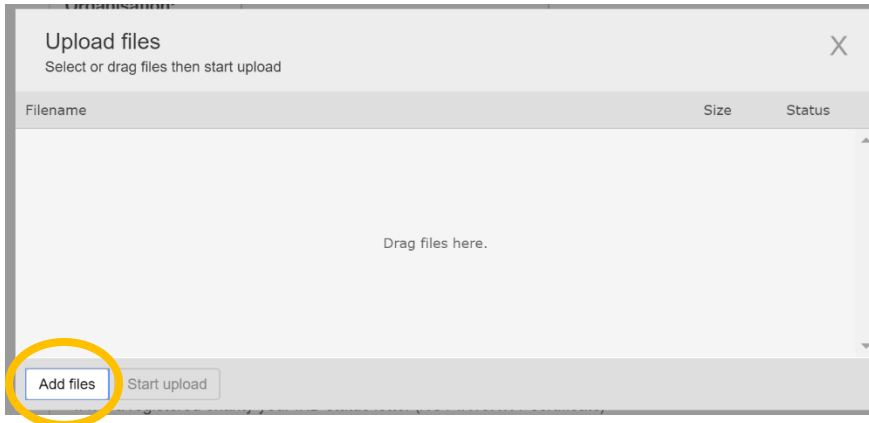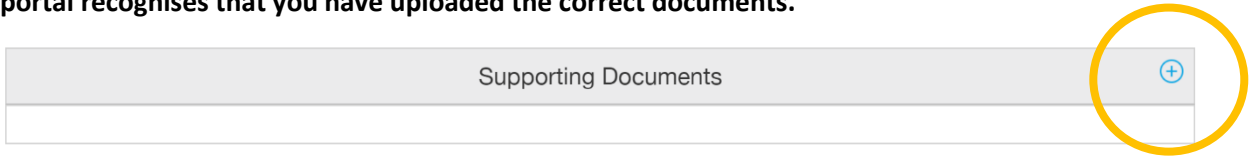
**6. When you have completed the application form, click on Save – a pop up will appear 'Grant request was successfully updated'. Then you can click Submit.**

**7. After you have hit Submit a pop up will appear 'Note for Submit' you can either add a note or simply click ok.**
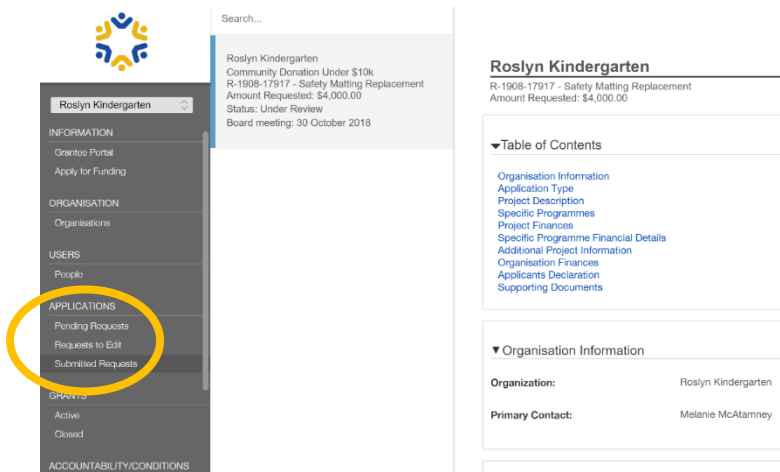
8. If there is missing information in the application form, it will not submit and move into the OCT portal. Any errors or missing information will appear in red on the application form.
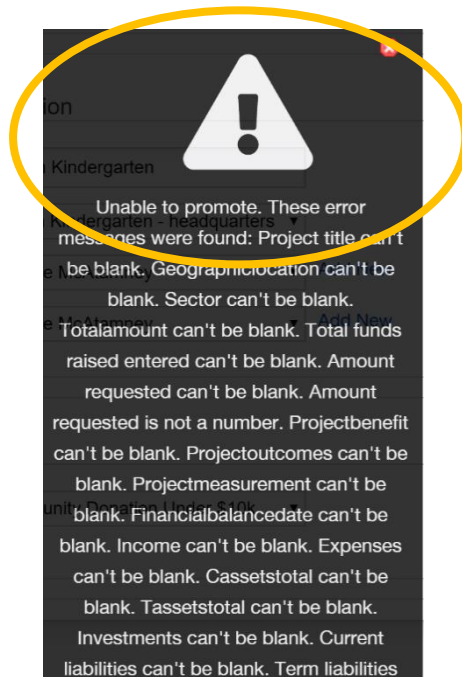
9. If the application form has been submitted correctly you will receive no further pop up errors and you will receive an email from Otago Community Trust acknowledging that your application has been received.
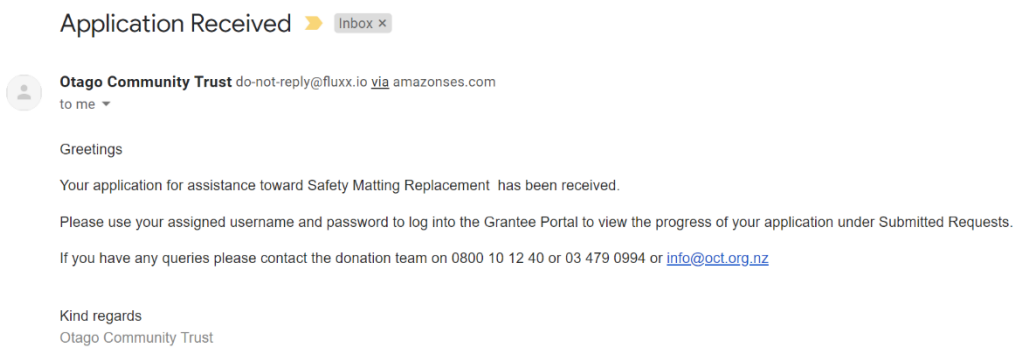
10. The application will now move into the Submitted Requests section of the portal. Here you can view the status of your application and the board meeting it has been allocated to for a decision.