

# GrantsPlus User Guide

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# About GrantsPlus

GrantsPlus is the new online application system for Glasspool. GrantsPlus will assist us to assess applications more efficiently. This will enable us to spend more time developing work to provide greater support to individual beneficiaries and helping more people.

To be able to use the new system you will need to register at <http://www.grantsplus.org.uk>

# Registering with GrantsPlus

In order to use GrantsPlus you will need to register as a user.

Go to <http://www.grantsplus.org.uk> and click **'Register'**

## Step 1: Eligibility Check

You will need to confirm that you are an employee at an agency. Only employees at agencies may register, we do not allow individual members of the public to register. If you are employed at an agency select 'Employee at an agency' if you are not then unfortunately you will not be able to register to use GrantsPlus.

Before proceeding please visit <http://www.glasspool.org.uk/grants/who-can-apply> for information on what type of agencies may apply.

## Step 2: Enter the name of your agency

You now need to register or select your agency. If you are a branch and have a head office then you should register your branch details. The agency details you provide to us will be used by us to contact you or to make awards.

In the space provided you can start to type in the name of your agency. As you type a list of already registered agencies will be show. If your agency appears in this list then select this by clicking on the agency details. **Go to step 3 – Existing Agency.**

If your agency name does not appear then type in the full name of your agency and click **'New'**.

## Step 3: New Agency

By registering a new agency, you are confirming that you are authorised by your agency to do so. You will then become the authorised contact for your agency, being responsible for approving all new users of your agency. If needed, you can change the authorised contacts details at a later date.

### Agency Details:

Please select your agency details from the dropdown lists and enter your registration number of the relevant agency, depending on your agency type; such as Charity Commission, Company House, Industrial and Provident etc.

### Agency Address:

If you are a branch and have a head office then you should register your branch details. The agency details you provide to us will be used by us to contact you or to make awards.

### Agency Payment Details:

We still provide a number of grants via cheques and we will be moving over to making these via BACS and require that you provide your bank details. The 'Bank name' field is name of your bank, such as Nationwide, NatWest etc. The 'Account Name' field is ordinarily your agency name but this could be different (please confirm this with your accounts department).

### Personal Details:

These details should be your own and not those of your colleagues. Each user of GrantsPlus should have their own login details. As you are setting up your agency details you will also become the authorised contact. The Authorised contact is responsible for approving all new users at their agency. The authorised contact can be changed later on.

### Security:

The email address you provide will become your username to use GrantsPlus. You will also receive notification regarding updates to your application at this email address.

Once you have completed all the information you can then click 'submit details'.

## Step 3: Existing Agency Details

Please check that the details shown are those of your specific agency. If you are a branch, please check that it is your branch details and not your head office. If you have selected the wrong agency click '**Reset**' to start the registration process. If the agency details are correct then please complete 'Personal Details' and 'security'.

**Personal Details:** These details should be your own and not those of your colleagues. Each user of GrantsPlus should have their own login details.

**Security:** The email address you provide will become your username to use GrantsPlus. You will also receive notification regarding updates to your application at this email address.

Once you have completed all the information you can then click 'submit details'.

## Confirmation Emails

Confirmation emails for your registration will be sent to your email address as well to the authorised contact. You will not be able to use GrantsPlus until you click your confirmation email. You will also not be able to submit an application until your agency's authorised contact has approved your registration. You will however be able to work on an application and save until you have been approved.

# Logging in & Dashboard

To login to GrantsPlus you will need to use your email address and password that you used to register with. If you can't remember your password you can click the **'Forgot Password'** link found in the login box. You will then be sent a reset password email.

Once you have logged in to GrantsPlus you will be taken to your dashboard. On your dashboard are icons that show you the various stages of your application. Click an icon will take you to those applications.

Once you have logged in to GrantsPlus you will be taken to your dashboard. On your dashboard are icons that show you the various stages of your application. Click an icon will take you to those applications.

<b>+ Create New Application</b>	This will start a new blank application for you to complete.
<b>Application – My Applications</b>	This will take you to a list of all your applications.
<b>Applications – Offers Issued</b>	This will take you to your applications where an award has been made and you need to confirm.
<b>Applications – Further Info</b>	This will take you to your applications where we are requesting more information.
<b>Applications – Conditional</b>	This will take you to your applications where we are making an award but there is a condition that is required before the award can be made.
<b>Applications – New</b>	This will take you to your incomplete applications that you have not yet submitted.
<b>Applications - Submitted</b>	This will take you to your applications that you have submitted for an award.

# Making an Application

Once you have logged in to GrantsPlus you will be taken to your dashboard. From here you can click the **'+ Create New Application'** button to start a new application.

## Sections

The application form users a wizard to take you through the process. As you complete each section you will then be taken to the next section.

## Summary Details

This Section will only appear once your application has been submitted. It shows a summary of the applicant details and the needs being requested.

## Applicants

This is the initial page of the application form that you are taken to after clicking **'+ Create New Application'**.

### Date Protection Policy:

In order to make an application you will first need to confirm that you have understood and adhere to our data protection policy. The tick box will need to be ticked before proceeding.

If you see an error message saying **'Data Protection - Data protection policy must be confirmed'** you will need to need tick the statement box.

### Personal Details:

The details here are for the main applicant in the household. You will be able to add further household members later on but the main applicant will be the contact details for the application should an award be made.

### Address:

The address details will only need to be entered once, regardless of how many members there are in the household. The address can be changed at a later date if your client is moving home or does not currently have a home.

### Contact Details:

We would never contact your client directly but if an award is made we will need to pass these details on to our supplier to arrange delivery.



When you have completed the above sections you need to click 'Save & Continue'. You will then need to scroll back down the page to the next area.

#### Other Household Details:

Once you have clicked 'Save & Continue' you can then add more household members by clicking '+Add Person' and add their personal details and contact details.

#### Employment History:

After you have added all household members you can then add the employment history for each member. We use this information to search for other funders who you may be able to apply for additional support.

## Household Finances

#### Household Income – Earned Income:

If your client receives any Wage, Pension, Child Maintenance or Ongoing grants then it should be entered in this area. Essentially any income that is not a benefit should be entered here.

#### Household Income – Benefits:

We would expect that you have checked your client's benefit entitlement and any income received from either means or non means tested benefits (e.g. Housing Benefit, Council Tax Benefit, JSA, ESA, Universal Credit, Child Tax Credit, Child Benefit, DLA/PIP, Carer's Allowance etc) should be entered here.

If your client does not receive any income then select the reason from the 'No Income Reason' dropdown.

#### Expenditure:

Depending on the income selected this section may or may not appear. If this section appears then all expenditure should be entered. Including, if applicable, how your client spends their disability benefit.

#### Debts:

Please list all of your client's debts; we may be able to provide you with suggestions which may help your client with their debts. If your client's debt is greater than 10% of their total income we will ask how they are managing their debts.

For any of the above sections, whenever 'other' is selected from the dropdown as an option, then other details must be included.

#### Balance:

Glasspool's grants are awarded where the client meets our hardship criteria and is in financial distress. There needs to be visible evidence of this therefore, if there is a surplus in the balance figure we will require an explanation for the surplus. However, if the expenditure section did not appear for you to complete, you can ignore any surplus.

#### Savings:

We take savings into account when assessing an application. If your client has savings please give amount and reasons.

Once you have completed you can click 'Save & Continue' to move to the next section.

## Presenting Issues

Please select from the dropdown the presenting issues of your client/s. You can select up to three different presenting issues and these can be associated with different household members. If the issue affects the whole household then please select the main applicant.

Once you have completed you can click '**Save & Continue**' to move to the next section.

## Needs

You can select up to three different needs, although we normally only provide one item and would assume that the priority need is the first one selected. The need can be a standard and non-standard item. A standard item is something that we normally award whereas a non-standard item is for usually for exceptional cases and cases which may be linked to a disability/mobility related need.

Once you have completed you can click 'Save & Continue' to move to the next section.

## Need Questionnaire

Depending on the need requested you will then be asked various different questions relating to that need. Such as why your client requires it and if it is a replacement. If you have picked multiple needs then you will be asked questions for the need before being asked about the next need.

When you are given an open question, please limit your response to information that we only need to assess the application. Please do not give personal detailed background information on your client/s that is not relevant to the application.

Once you have answered the last question and click 'ok' you will move to the next section.

## Statutory Questionnaire

This section is broken down into three areas.

### Local Welfare Scheme:

We would expect you to apply to the Local Welfare Scheme, if eligible, before applying for a grant. We ask if an application has been made to the Local Welfare Scheme which replaced Community Care Grants and is administered by your applicants Local Authority/County Council.

### Social Services:

We ask if any of the household members were previously, are currently or are in the process of applying to be supported by Social Services or another statutory organisation?

### Asylum Seekers and Refugees:

Is the applicant seeking asylum or presenting as a refugee?

Once you have answered the last question and click 'ok' you will move to the next section.

## Support Offered

This section helps us see what other support you are offering the client. This creates a bigger package of support and shows us how our grant fits into the overall support package you are providing. You can add as many different activities that you are providing. If the support is for the whole household then please select the main applicant.

Once you have completed you can click 'Save & Continue' to move to the next section.

## Grant Funding (External Support)

This section is used to show applications or awards being made to/from other grant funders. This information shows us what support the client is receiving from other grant funders and if we can signpost you to others.

Once you have completed you can click 'Save & Continue' to move to the next section.

## Additional Support (Other Agencies)

Please use this section to show us if your client is receiving additional support from other agencies. This creates a bigger package of support and shows us how our grant fits into the overall support package you are providing.

Once you have completed you can click 'Save & Continue' to move to the next section.

## Outcomes

This section is used to describe what difference our grant will make to your client. You can select up to three outcomes and associate them with a specific family member. If the issue affects the whole household then please select the main applicant.

Once you have completed you can click 'Save & Continue' to move to the next section.

## Additional Info

Please limit your response to information that we only need to assess the application. Please do not give personal detailed background information on your client/s that is not relevant to the application.

Once you have completed you can click 'Save & Continue' to move to the next section.

## Submit Application

This section is used to submit and recall your application and showing further information when requested.

### Application Submission:

To submit your application click 'Submit'. You can recall the application by clicking 'Recall' though you can't do this once a member of the Grant Team starts to look at your application.

Once you have submitted your application you can now logout the system or go back to your dashboard.

### Further Information:

When we request further information regarding your application you will be sent an email notification and a link that will take you to the specific application and to this section on the form. If you don't have the link you can go the application and click the 'Submit Application' link under

SECTIONS on the right hand side of the screen. This area will not appear unless further information has been requested.

When submitting further information If you see an error message saying '[Data Protection](#) - Data protection policy must be confirmed' you will need to need tick the statement box found at the very top of the 'Applicant' SECTION.

## Offer Details

When we make an offer you will be sent an email notification and a link that will take you to the specific application and to this section on the form. If you don't have the link you can go the application and click the 'Offer Details' link under SECTIONS on the right hand side of the screen. This area will not appear unless further information has been requested.

# Offers

When we make a decision on an application and decide to make a grant we call these offers.

When we make an offer you will be sent an email notification and a link that will take you to the specific application and to this section on the form. If you don't have the link you can go the application and click the 'Offer Details' link under SECTIONS on the right hand side of the screen.

## Accepting an Offer

When we make the offer you will then asked to confirm the details.

### Cash Offers:

To change the payee details click the arrow ( ▶ ) next to the offer details and click 'save'. Please note we do not make cheques payable directly to the individual. The payee name should be the name of your organisation.

### Goods Offers:

To change the client's address – Click 'Change' in the main applicant details above the offer details. You can then update the client address and contact number and click 'Change Address' when complete.

To accept the offer(s) click 'Accept' next to each offer line. Note that the status of the offer when you came to this screen was 'Offered', once you click accept it will then change to 'Confirmed'.

Currently you can only cancel an offer that you have previously accepted by contacting us by email at [GrantsPlus@glasspool.org.uk](mailto:GrantsPlus@glasspool.org.uk). Please quote your application reference number and reasons for cancelling.

## Rejecting an Offer

To reject an offer click 'Reject' next to each offer line. You will then be asked to confirm that you want to reject. A further popup box will then ask you why you want to reject the offer. Please select the reason from the dropdown list and click 'Reject Offer'. You can click 'Cancel' to close the option.

Currently if you cancel an offer by accident you will need to contact us by email at [GrantsPlus@glasspool.org.uk](mailto:GrantsPlus@glasspool.org.uk). Please quote your application reference number.

# Changing the need requested

## Before the Application has been reviewed

Firstly you will need to recall the application. Go to the application and click the 'Submit Application' link under SECTIONS on the right hand side of the screen. Then click the 'recall' button.

Then go to the 'Needs' section using the SECTIONS on the right hand side of the screen. Select the new need and click 'Save & Continue' to go through to the 'Need Questionnaire' section. Once you have answered all the questions you can then go back to the 'Submit Application' section and click the 'Submit' button. Your application will then go back to the Grants Team for assessment.

Once you have submitted your application you can now logout the system or go back to your dashboard.

## After the application has been reviewed

Currently if you need to change the need requested you will need to contact us by email at [GrantsPlus@glasspool.org.uk](mailto:GrantsPlus@glasspool.org.uk). Please quote your application reference number and inform us of the need being requested and the needs no longer required. We will then reset the 'need' section on your application so that you can answer the questions specific to need.

# Responding to Further Information

When we have a question regarding your application we will then contact you via GrantsPlus with that question, we call this process 'Further Information'.

When we request further information regarding your application you will be sent an email notification and a link that will take you to the specific application and to this section on the form. If you don't have the link you can go to the application and click the 'Submit Application' link under SECTIONS on the right hand side of the screen. This area will not appear unless further information has been requested.

To respond to the further information click 'Add New' and then type your text into the field. When completed click 'Save' do not press return/enter as this will lose your text. Once you have completed saved the text you will need to click 'Submit'.

Your application will now go back to the Grant Team for assessment.



# Status of an application

Your application will have different statuses throughout the assessment process. The status is in brackets at the top of each application after the application number and client name.

The various status types an application can have are:

**New** – This is an incomplete application that you have not yet submitted for assessment.

**Submitted** – This is a complete application that has been submitted for assessment.

**Approved** – This application has been assessed by a member of the Grant Team and has been approved. The award has not yet been offered to you. This status is a short transition status and your application should not have this status for longer than 1 hour.

**Offers Issued** – The application has been approved and an award has been offered to you. Offers can have their own statuses and to check the progress of an offer you will need to go to the [‘Offer Details’](#) section to find out more.

**Conditional** – The application has been approved and an award made but there is a condition to the award that must be met first.

**Further Info Requested** – The Grant Team require some more information before they can make a decision and you will need to respond.

**Refer Internal** – Your application has been referred within Glasspool for review by another member of staff.

**Withdrawn by Support Worker** – You have withdrawn your application.

**Cancelled by Glasspool** – Glasspool have withdrawn your application. This could be due to a duplicate application.

**Regret/Rejected** – Unfortunately your application was not successful and no award will be made.

# Status of an Offer

When we make an offer you will be sent an email notification and a link that will take you to the specific application and to this section on the form. If you don't have the link you can go the application and click the '**Offer Details**' link under **SECTIONS** on the right hand side of the screen. This area will not appear unless further information has been requested.

Your offer will have different statuses throughout the process. The status is next to each offer details.

## Cash Offer Status

On the summary page of the application scroll down to '**Cash Offers**'. A cash offer can have any one of the following status:

**New** - The offer has not yet been made by Glasspool to you

**Offered** - The offer has been made by Glasspool to you

**Confirmed** - You have confirmed the offer and cheque is ready to be printed

**Sent for Payment** - The cheque has been printed and sent

**Grant Returned** - The cheque has been returned

**No longer required** - You have informed us that you longer required the item

**Cancelled by us** - We have cancelled the offer. This could be due to a change in award being made.

## Goods Offer Status

On the summary page of the application scroll down to 'Goods Offers'. A Goods offer can have any one of the following status:

**New** - The offer has not yet been made by Glasspool to you

**Offered** - The offer has been made by Glasspool to you

**Confirmed** - You have confirmed the offer and order is ready to be placed

**Invoice ok to pay, Payment sent or Paid** - The goods have been delivered to the client

**No longer required** - You have informed us that you longer requires the item

**Cancelled by us** - We have cancelled the offer. This could be due to a change in award being made.

## Checking the date of the offer being ordered or printed

At the moment the only way to check the date of when an order was placed or cheque printed is to look at the last time the record was modified/updated. You can look at the 'This Record' box on the right hand side which will show the last time that transaction was modified/updated.

**This Record**

Created by: RLGadmin  
Created on: 11/08/2016 11:25  
Modified by: RLGadmin  
Modified on: 11/08/2016 11:25

# Time Frame for receiving Cheques and Orders via our Suppliers.

Cheques are printed weekly and sent out by 2nd class post. Once you confirm a cash offer you will receive the cheque within 10 working days.

Orders are placed with our suppliers weekly. Once you have confirmed an offer, the client/contact person for your order will be contacted by our supplier with 10 working days. If your Offer status is 'Ordered' and you have not heard from our supplier after 10 working days, please call our supplier directly and quote your offer reference number starting with 'OG'.

**For Beds & Bedding** - Dreams 01628 535 336

**For White Goods** - Co-Op Electrical 0845 250 4311 (then Select Option 1)

Please do not contact us regarding orders placed within the 10 working day time frame as this does cause further delays.