HEARSTfoundations

GRANT REPORT INSTRUCTIONS

Please read this document entirely before starting a report.

Grant Report Tips and Best Practices:

➢ Use these instructions throughout the process. Instructions are best viewed on screens, not on paper, so you can zoom in on screenshots (and save paper!). Please review the instructions in full before beginning the report.

➢ Please use **Chrome** or **Firefox** as the browser to complete the report.

➢ Bookmark the Dashboard page to return directly to the portal: https://hearstfoundations.force.com/grants/

➢ Review the report in its entirety before starting to complete the fields. This will help strategize how best to proceed.

➢ Work in intervals. The **Save** button is provided such that you do not need to complete the report in one sitting.

➢ Avoid using browser navigation buttons as they will exit from report. Please use the navigation buttons at the top and bottom of the report pages to advance. You may need to save the report for these buttons to appear.

➢ Be sure to read **Help Text** that appears below each header for guidance on the requested information.

➢ Enter numbers only in fields requesting a dollar amount or fiscal year. Please do not include any non-numeric characters. Please review Help Text for clarity on what is needed in a specific field.

➢ Note character limits. The suggested length is stated in Help Text. **Please disregard the character count calculators that appear under text fields.**

➢ Compose, spell check, and save any lengthy answers in a word processing program, such as Word, and then copy and paste them into the report fields and **save**.

➢ Focus on the red: Required fields will display a red asterisk on the right side of the field. Error messages will be displayed in red or yellow on the top of the page upon saving.

Portal Registration:

For portal users who have already activated their new portal accounts on the new portal (launched in October 2020), they can login with the new username and password.

For those portal users whose login information was created on the previous version of the portal (before October 2020), and who have **NOT** yet activated new accounts, please follow the steps below :
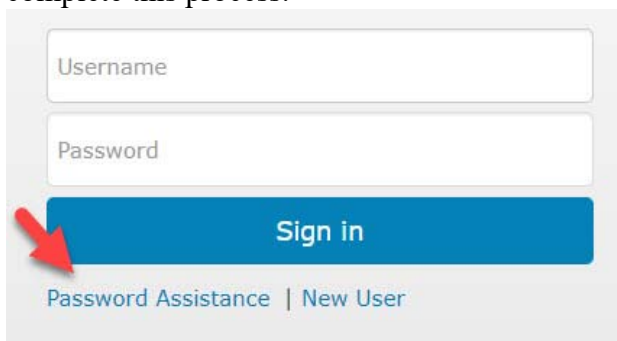
Step 1:

Contact the Hearst Foundations. If an organization is based **East of the Mississippi River**, please email **support.ny@hearstfdn.org** and if an organization is based **West of the Mississippi River**, please contact **support.sf@hearstfdn.org** for set up.

The Hearst Foundations staff will create a new account and an email will be sent to the registered email address to complete the process.

Step 2:

Upon receipt of the email (check SPAM folders, if not received immediately), the portal user must **click the link to verify** the email address and follow the remaining steps to activate the account.

Once the portal user has verified the email address and confirmed the new portal username, he/she can set up a password. Click the **Password Assistance** link to complete this process.

NOTE: You may wish to view the **instructional video for password setup** on the Hearst Foundation's website's **Applying & Reporting** select **"How to Apply"** page for further assistance
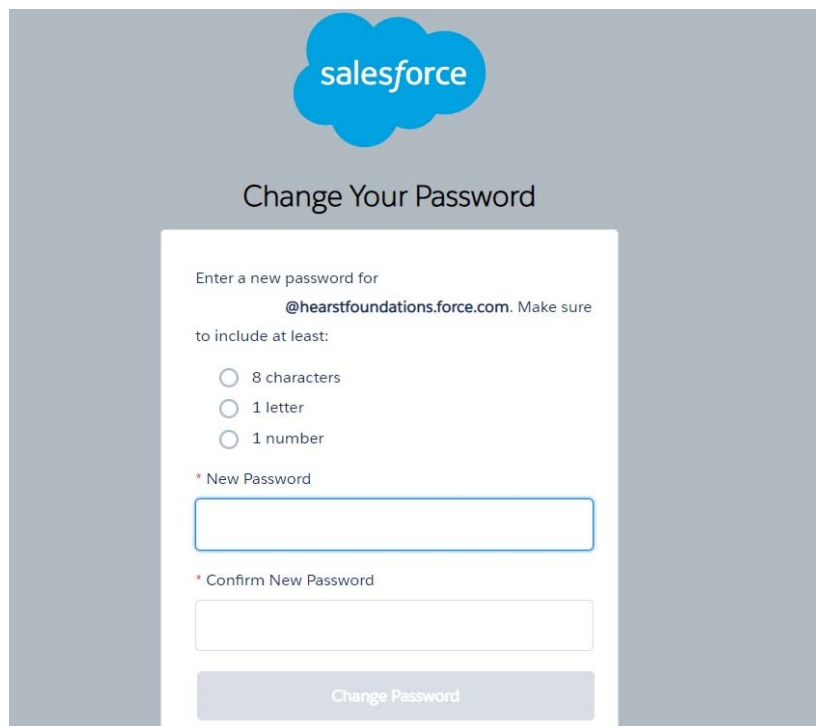
Step 3:

To set the new password, the portal user will need to provide the new username.

If you are having difficulty logging in, please confirm that you entered the correct user name and password for the new Hearst Foundations Portal (launched October 2020). Passwords are case sensitive. If you are a returning user and have not created new login information for the new portal, you will need to create new login information by contacting support.sf@hearstfdn.org, if your organization is located west of the Mississippi River or support.ny@hearstfdn.org, if your organization is located east of the Mississippi River. If you have already established your account on the new portal and your login details are not working, please request a password reset by entering your user name below. If you already requested a password reset and were directed to this page after clicking the link in your email, your reset link may have expired or has already been used. Please reset your password again and copy and paste the reset link into your browser.

Username   Continue

Step 4:

The new password must contain eight characters, with at least one letter and at least one number. **Please note the new Portal username and Password** for future access to applications and reports.

salesforce

Change Your Password

Enter a new password for
@hearstfoundations.force.com. Make sure
to include at least:

○ 8 characters
○ 1 letter
○ 1 number

* New Password

* Confirm New Password

Change Password

Accessing the Grant Report:

Using the link from the Hearst Foundation website's **Applying & Reporting section,** select the "**How to Report"** page, click the link provided to access the portal and log in to the portal.

Once logged in, the Dashboard should appear. If the Dashboard does not appear, please select **Dashboard** on the top, left corner. For your convenience, we recommend bookmarking the Dashboard URL. On the left side, select **Grant Report**. All grant reports will then be listed. Please identify the **Scheduled** report under the **Status** column with the appropriate **Due Date** and **Record Type ID** and select the **Edit** icon to begin the report

How to Complete the Report:

Endowment Reports:

- Please complete either the **Hearst Scholarship/Program** or **Institutional Endowment** (non-named) section as it relates to the purpose of your organization's Hearst Endowed Fund.
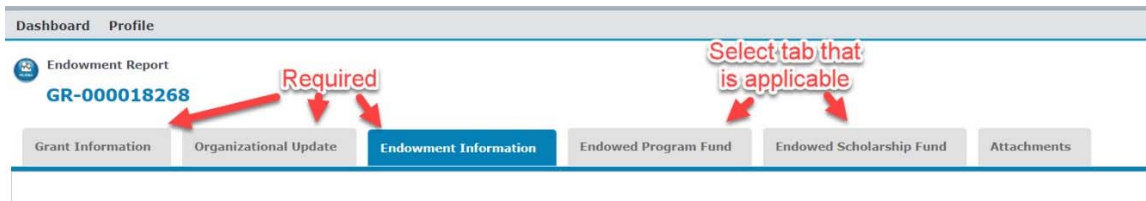
- Please complete the report for the year of your most recently completed Audit, as indicated by the report's fiscal year.
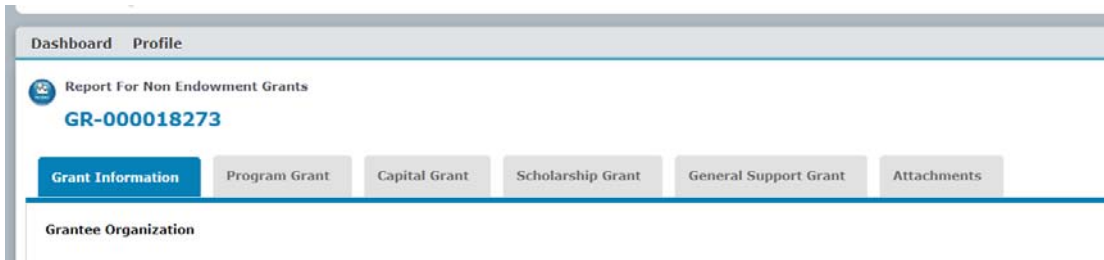
- If your organization has more than one Hearst Fund, each report will be separately listed.

Program Reports (includes General Support, Capital, Scholarship & Research grants):

- Please complete the **Grant Information** section and those sections specific to your type of grant, as indicated on the tabs.

Steps to Completing the Report:

1. For both **Endowment and Program reports**, please complete all fields that relate to your organization and specific grant. We recognize that this new reporting layout has large blank spaces between instructions and fields, and we appreciate your patience in navigating it.

2. Please use the **Help Text** between the field name and text fields for instructions for specific fields and use the **Grant Reporting Guidelines** on the Hearst Foundations website's **Applying & Reporting** on **How to Report** page.

3. For **Program Reports,** please note the first three fields on the Grant Information page **are not editable**. Please begin with the question: *Were the grant funds from the Hearst Foundations fully expended?*

4. For **Endowment Reports,** please note the top fields on the Grant Information page **should not be edited**. Please begin with the fields requesting contact information for the person submitting the report.

5. Please follow the character counts that are included in the Help Text and disregard the character count calculator under the text fields (they are inaccurate and will cause issues when submitting the report).
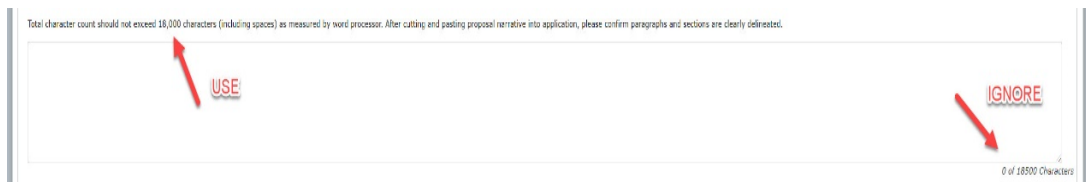
6. The individual completing and submitting the report should enter contact information under the **Report Contact** section at the bottom of the report. Please do not edit information under the **Profile** section of the portal.

7. After saving your entries with the **Save** or **Save & Next** button, you can advance to the next tab. Please check the top of the page for error messages in yellow. This will give you specific areas to revise in order to proceed.

8. For **Program (Non-Endowment) reports**, please complete requested information on the **Benchmarks** tab. Please describe progress toward the goals established at proposal submission in: a) number and b) percentage terms and briefly describe impact and outcomes for each goal.

9. For both **Endowment** and **Program reports**, select the **Attachments** tab, where you will upload attachments in PDF/Word/Excel format (PDF preferred). Once you have uploaded all documents on the **Attachments** tab, click the **Review/Submit** button.

10. On the **Review/Submit** tab, you can review, print and submit the grant report.

11. If there are no error messages on any tabs, your report should submit. Please confirm this by checking the status on the **Dashboard**, which should list the report as **Submitted**.

			All ▾	All ▾	All ▾
✏	🔍		2019-06-20 Test	Application	Program	Application Started
	🔍		GR-000017152	Grant Report	Report for Non Endowment Grants	Submitted

Questions:

If your organization is based East of the Mississippi River, please email Mayra Cedeño in New York at mcedeno@hearstfdn.org or if your organization is based West of the Mississippi River, please contact Annette Hepler in San Francisco at ahepler@hearstfdn.org.

Revised October 2020