How to Review Applications Via ZoomGrants™

Tips and Tools for Reviewing, Scoring, and Voting on Applications

2 Quick Things to Know: ZOOMGRANTS UNIVERSITY

THE AUTO-SAVE FEATURE

ZoomGrants™ automatically saves your progress, so you can log out and log back in as many times as you need to in order to complete your review. Whenever you make a change in a field then click outside of that field (such as a Scoring Comment or My Notes) **or change your selection in a radio button or dropdown menu, you'll see a flash of the 'Saving' screen as your change is being saved.**

(Note: If you see the 'Saving' message for more than a few seconds your Internet connection may have blinked for a moment during the saving process and the change may not have been saved. Double click anywhere on the page to cancel the save and make a note of the change that you made. If you made the change in a text field, tweak the answer slightly, then click outside of the field to try the save again. If you selected a radio button or dropdown, select a different dropdown or radio button, wait for the save to occur, then make your original choice again. If you continue to have difficulty, check your Internet connection. You can also call our Technical Support team – (866) 323-5404 x2.)

THE TAB SYSTEM

ZoomGrants™ predominantly uses a tab system to set apart the different sections and features of the system. You can click on each tab to access the content housed there.

About This Tutorial:

To provide instructions for reviewing, scoring, and voting on Applications while also giving a tour of the ZoomGrants™ system, this tutorial uses two different colors to denote the different types of information provided.

ORANGE NUMBERS

These are **sequential instructions** that can be followed by users who just want to know how to review Applications via ZoomGrants™.

BLUE/GREEN LETTERS

These are **extra notes** regarding the ZoomGrants™ system and its features.
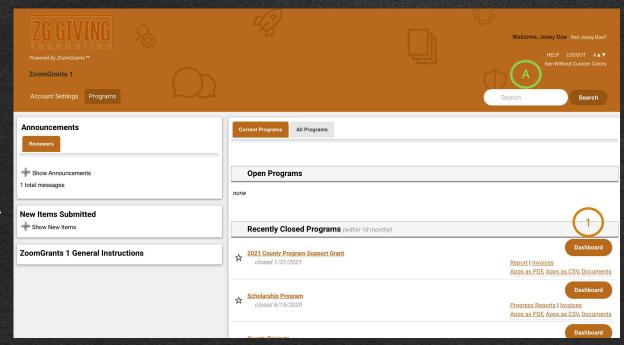
MY ACCOUNT

In order to serve on a Review Committee, you must have a ZoomGrants™ account. The Program Administrator for the funding organization will set up your account using your email address and he or she will also create your password.

1. PROGRAM DASHBOARD

Click a Program title or the Dashboard button to access that Program.

A. SEARCH

Use the Search field to quickly find Applications by entering part of the Application title, Application contact, etc. You will only be able to access Applications and Programs to which you have been assigned as a Funding Committee Member.

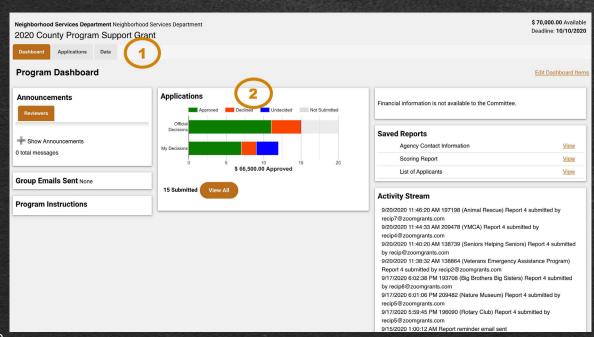# PROGRAM DASHBOARD – Quick Tour

1. QUICK ACCESS TABS

These tabs provide quick access to Application lists and the Data page.

2. APPLICATIONS CHART

Depending on the settings chosen by the Administrator, you may be assigned to review all or some specific Applications, or you may have access to all of the Submitted Applications.

Click the color-coded bars in the My Decisions section to view lists of Applications with the selected vote. *The screenshot to the right, for example, indicates that this Committee Member has voted to Approve several Applications, Decline several, and is still Undecided about some.*

To view a list of all of the Applications that you've been asked to read, click the View All button at the bottom of the Applications section.

*This feature may not appear, depending on the settings set by the Administrator.

Want to learn more? Go to

APPLICATIONS LIST – Navigation

1. OPEN AN APPLICATION

Click an Application title to open that Application to view the content.
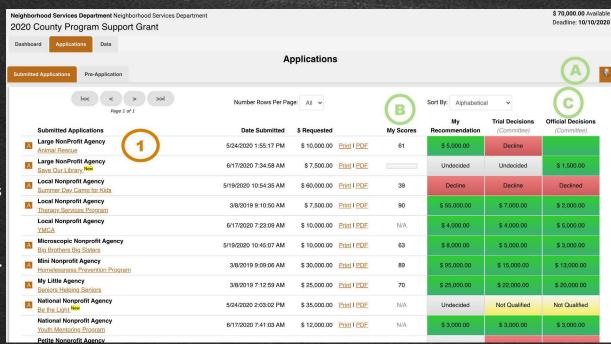
A. SET FILTER*

Use these checkboxes to determine which Applications are included in the list.

B. MY SCORES*

As you score each Application, the My Scores column in the Applications list will display either a progress bar (if you are not finished assigning a score for *every* criterion) or the total score that you gave to that Application. This is another way to keep track of your progress.

C. SORT BY COLUMN

Click a bold column header to sort the Applications list by that column. Click again to reverse the sort.
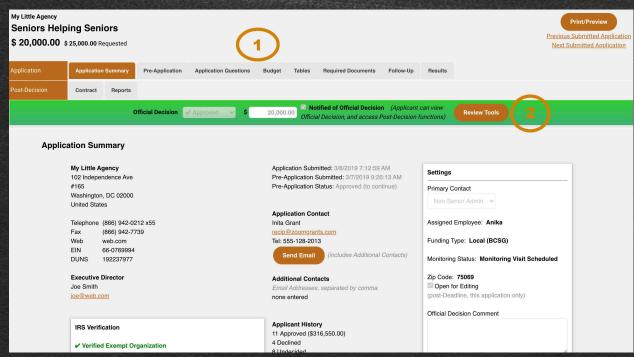
READING APPLICATIONS – Navigation

1. APPLICATION TABS

Click through the Application tabs to view the Application content.

2. REVIEW TOOLS

The Administrator may set up several helpful Review Tools – My Notes*, Discussion*, Internal Research*, Scoring*, and Decisions – that you can use as you work through the Applications. Click on the button to access those features.

*This feature may not appear or may have a different label, depending on the settings chosen by the administrator

READING APPLICATIONS – Scoring*

1. SCORING QUESTIONS*

The Administrator creates Scoring Questions based on relevant criteria. For each question, select a score in the Score dropdown. If applicable, you can also enter a Comment on each Scoring Question.
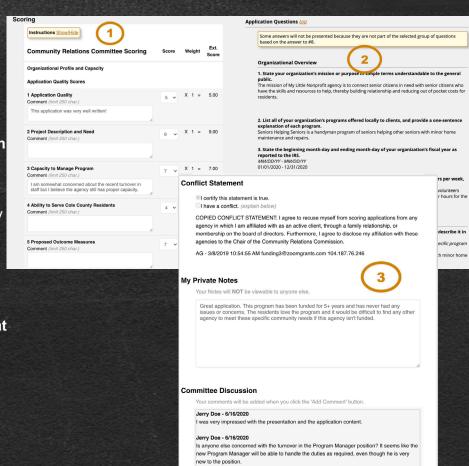
2. SPLIT SCREEN

The full application is viewable next to the scoring section to make it easy to refer back to as needed.

3.ADDITIONAL FEATURES

Administrators may choose to collect a Conflict Statement and/or allow committee members to hold group discussions on each application. You may also keep private notes on each application that you review.

Some funders choose to set up separate Committee and **Administrative Scoring Questions*.** Administrative Scoring Questions* can only be completed by Administrative users.
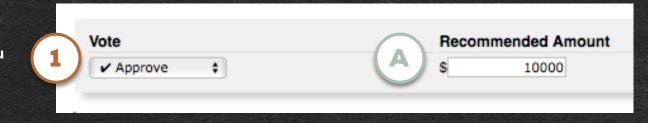

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.

READING APPLICATIONS – Decisions*

1. MY DECISION*

Once you've completed your Review, you may cast your vote at the top of the Review Tools. If you vote to Approve an Application, be sure to enter the Recommended Amount, too (**A**).

READING APPLICATIONS – Data

1. DATA

Click into the Data tab in the Program-level tabs to generate customized reports to use as you compare applications and make your considerations.

2. CUSTOM DATA REPORT

1. Set a Filter – Choose which Applications you'd like to include in the Report.

2. Choose a View – Tell the system how you would like the results presented.

Please note: some fields (such as Tables) are limited to select views.

3. Select the Fields – Scroll down and click the checkbox(es) next to the field(s) that you'd like to include in the Report (A).

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.