

# NGO*source*

Guide to the Grantmaker Portal

# NGOsource: How to Use the Online Grantmaker Portal

## How to Make a Request

1. Log into your account: <https://members.ngosource.org/>

2. Select **Request an ED**

The screenshot shows the NGOsource dashboard. At the top, there are navigation tabs: Dashboard, Request an ED (highlighted with a red arrow), My Account, and My ED Requests. Below the tabs, the NGOsource logo is followed by summary statistics: ED Requests: 22, Countries: 12, and Completed EDs: 10. The main content area is divided into two sections: 'Our ED Requests' and 'Our ED Snapshot'. 'Our ED Requests' is a table with columns for Name, ED Progress, Due, and Status. 'Our ED Snapshot' is a bar chart showing the distribution of EDs across different stages: GM Processing, NGO Processing (12), NGOsource Processing, and Complete (10).

Name	ED Progress	Due	Status
The Performing and Visual Arts Centre Limited	<div style="width: 25%;"></div>	7/15/2016	Questionnaire in Process
Youth Agenda	<div style="width: 25%;"></div>	7/15/2016	Questionnaire in Process
Community Organisation Resource Centre	<div style="width: 25%;"></div>	7/18/2016	Questionnaire in Process
Friends of Lake Turkana	<div style="width: 25%;"></div>	7/18/2016	Questionnaire in Process
Southern Africa Trust	<div style="width: 25%;"></div>	7/18/2016	Questionnaire in Process

3. Search for the NGO. Note that, when searching for an NGO, please try searching for all possible names for the NGO (including its legal name) before selecting **“Request ED for a new NGO”**. This is so that if it is already in our system, we want to make sure you get charged for the correct amount.

If you are unsure, please contact NGOsource at [accountsupport@ngosource.org](mailto:accountsupport@ngosource.org).

The screenshot shows the 'Request an ED' search form. At the top, there are navigation tabs: Dashboard, Request an ED (highlighted), My Account, and My ED Requests. Below the tabs, there is a progress indicator for the 'Request an ED' process, showing five steps: Step 1: Choose an Org (highlighted), Step 2: Add Information, Step 3: Review Information, Step 4: Choose Payment, and Step 5: Request Submitted. The main form area is titled 'Search for an organization' and includes fields for Organization name, Organization country, and Determination status. A 'Search' button is located at the bottom left. A callout box on the right asks 'Can't find the NGO?' and provides instructions on how to add a new NGO.

## How to Read the Statuses in GMP

1.	<b>In Progress</b>	The NGO’s ED may already be in process but is not yet certified.
	<b>Not Certified</b>	The NGO may have been determined as “not currently qualified.” Please reach out to <a href="mailto:accountsupport@ngosource.org">accountsupport@ngosource.org</a> for more information
	<b>Not Reviewed</b>	The list of NGOs in the NGOsource repository is pulled from TechSoup’s comprehensive list of international NGOs. This NGO may have worked with TechSoup on other programs, but not have worked with NGOsource on an ED yet. We have the organization’s basic information already, but a new ED would be required.
	<b>Expired</b>	This NGO was previously certified but will need to be renewed (\$850).
	<b>Certified</b>	This NGO already has a certification in our repository, and you can select the <b>Ready to Go</b> ED for \$250.

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2. Select the organization you would like the ED on by clicking **Choose this NGO**.

If the NGO is not listed from your search, select **Request ED for a new NGO**.

The screenshot shows the 'Request an ED' process in five steps: Step 1 (Choose an Org), Step 2 (Add Information), Step 3 (Review Information), Step 4 (Choose Payment), and Step 5 (Request Submitted). The current step is Step 1, 'Choose an Org', where a search for 'Bristol' has been performed. The search results show 290 organizations found. A table lists several organizations with columns for Organization Name, Location, Determination Status, and a 'Request an ED' button. A callout box titled 'Can't find the NGO?' provides instructions on how to add a new NGO and includes a 'Request ED for a new NGO' button, which is highlighted with a red arrow.

Organization Name	Location	Determination Status	Request an ED
The University of Bristol	Bristol, United Kingdom	Certified(Expires 7/31/2019)	<a href="#">Choose this NGO</a>
Young Bristol	BRISTOL, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>
Chas Bristol	Bristol, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>
VOLUNTEERING BRISTOL	BRISTOL, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>
BRISTOL VINEYARD	BRISTOL, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>
Bristol Mediation	Bristol, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>
BRISTOL SHOPMOBILITY	BRISTOL, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>
Changes Bristol	BRISTOL, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>
BRISTOL FESTIVALS	BRISTOL, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>
Emmaus Bristol	Bristol, United Kingdom	Not Reviewed	<a href="#">Choose this NGO</a>

3. Go through the screen prompts to confirm organization information and to provide contacts for the request.

- If you select an organization that was already listed, confirm that the organization's basic information matches with the one you would like a request on.
- Select a language from the drop down (it will default to English if no language is selected).
- Select a target completion date (unless otherwise notes, the earliest due date is 6 weeks from the ED request date, 4 weeks for renewals).
  - For **Ready to Go** EDs, the certificate will arrive in your account automatically within 24 hours.
  - Though our goal is to complete ED requests as soon as possible, please note that we may not always be able to meet target deadlines.
  - Please contact us at [accountsupport@ngosource.org](mailto:accountsupport@ngosource.org) if you have questions about the status of any of your EDs.
- You'll need to input the contact information for the organization if it's a new ED.
  - **NOTE:** We strongly recommend providing 2 contacts at the NGO if possible (this will ensure a quicker process).

4. Confirm that all information inputted for the NGO is correct.

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5.	<p><b>Select your Payment Method</b></p>	<p><b>Check:</b> If you would like to pay by check, please note that we will <b>never</b> wait to start the process until we receive payment.</p> <ul style="list-style-type: none"> <li>If you select check, an automated invoice will be sent to you once the request is processed.</li> </ul> <p><b>Credit Card:</b> If you would like to pay by credit card, an automated receipt will be sent to you once payment has been processed.</p> <ul style="list-style-type: none"> <li><b>Note:</b> If you would like to pay by wire or have any questions about billing, please contact <a href="mailto:billing@ngosource.org">billing@ngosource.org</a>.</li> </ul> <div data-bbox="472 495 1442 1121" style="border: 1px solid black; padding: 10px;"> <p>Thank you for trusting NGOsource with your equivalency determination (ED).</p> <p>Please note that if you pay by credit card, we will start to your ED as soon as your request is submitted.</p> <p>If you pay by check, we will start your ED within one business day and send you an invoice for the request. If you have any questions related to invoicing, please contact NGOsource Account Support at 1-855-NGO-SRCE or at <a href="mailto:accountsupport@ngosource.org">accountsupport@ngosource.org</a>.</p> <p><b>Organization Information</b></p> <table border="0"> <tr> <td><b>Organization</b></td> <td>Young Bristol</td> </tr> <tr> <td><b>Target Completion Date</b></td> <td>9/27/2018</td> </tr> <tr> <td><b>Fee</b></td> <td>\$1,760.00 (New ED Request - Small Foundation Special)</td> </tr> </table> <p><b>Payment Method *</b></p> <p> <input type="radio"/> Pay by credit card  <input type="radio"/> I will send a check         </p> <p><b>Special Instructions For NGOsource Staff</b> ?</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: center;"> <input type="button" value="Go Back"/> <input type="button" value="Cancel"/> <input type="button" value="Submit Request"/> </p> </div>	<b>Organization</b>	Young Bristol	<b>Target Completion Date</b>	9/27/2018	<b>Fee</b>	\$1,760.00 (New ED Request - Small Foundation Special)
<b>Organization</b>	Young Bristol							
<b>Target Completion Date</b>	9/27/2018							
<b>Fee</b>	\$1,760.00 (New ED Request - Small Foundation Special)							
6.	<p><b>Special Instructions</b></p>	<p>In the Special Instructions, please include any special instructions you would like us to follow during the ED process (for example, adding a third contact person or including additional organizational information).</p>						
7.	<p><b>Expediting the ED</b></p>	<p>If you would like to expedite your request, we do have a fee (\$500) and a commitment to complete the process within 4 weeks (for new EDs). Your organization will not be charged if we are unable to complete the process in 4 weeks.</p> <ul style="list-style-type: none"> <li>If you would like to choose this option, please include a note in the Special Instructions, and that you understand and confirm the additional fee.</li> <li>Please note that during peak ED seasons or for any other circumstances, the option to expedite EDs may be suspended.</li> </ul> <p>Contact us at <a href="mailto:accountsupport@ngosource.org">accountsupport@ngosource.org</a> if you have questions about our current turnaround times.</p>						
8.	<p><b>Submit Request</b></p>	<p>The NGO will receive the invitation to start the ED process within the hour. You will also receive an automated confirmation email of your request, which will include language on how to prepare your requested NGO for the ED process.</p>						

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## Editing the Settings on your Account

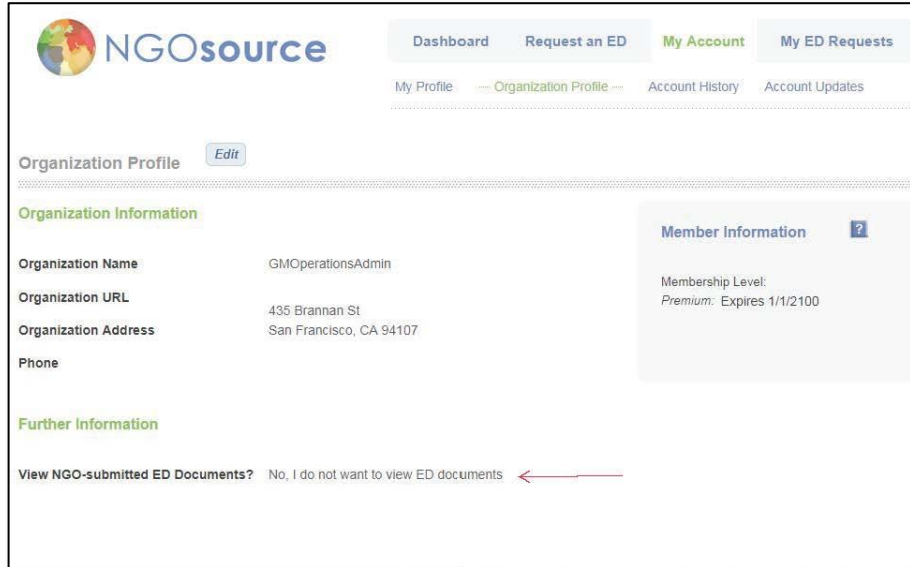
### 1. Notification Settings

We recommend putting in notifications for your requested EDs on a Weekly basis. You can change this under “My Account” → My Profile → Notifications.

Here, you can also choose to select whether you would like to receive emails and view ED information from all EDs requested by your organization, or just the ones you requested.

In addition, you can renew your Membership with NGOsource here.

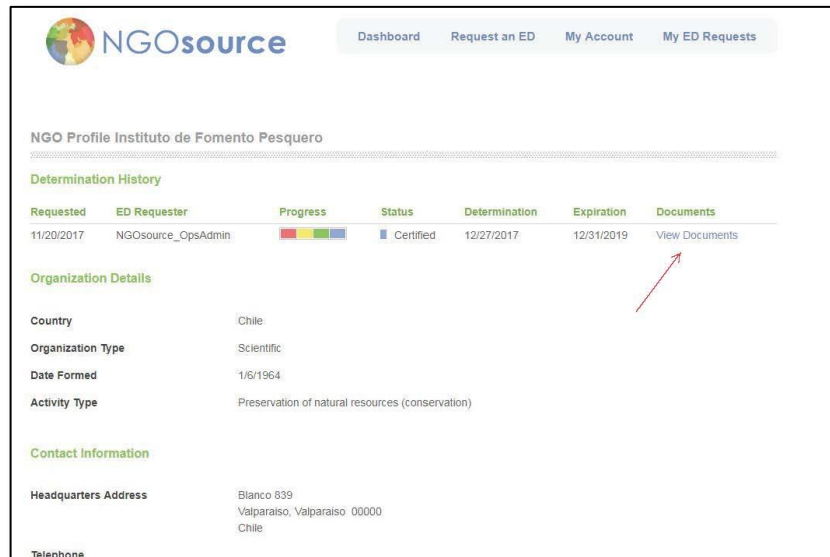
Under My Account → Organization Profile, you can edit whether you would like to view all NGO-submitted ED documents (which include any supporting documentation).



### 2. Downloading the Certificate and Analysis

Once NGOsource has completed the review of your organization, you will receive an automated message. Follow the directions there, or you can check by going straight to your account.

On your Dashboard, select the blue bar (Completed EDs), click on the NGO name, and click on View Documents. From there, you can download the Certificate, Analysis, and any supporting documentation.



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### Final Notes

1.	<b>Validity Period</b>	The validity period is dictated by law and will be clearly shown on the ED Certificate. EDs are generally valid for two years from the last completed fiscal year for which information was made available for review. In practice, therefore, the validity period is usually approximately 1-1.5 years from the date it is completed. <ul style="list-style-type: none"><li>• For example, if the organization submits actual financial income information through December 31, 2020, then the validity period of the certificate will be through December 31, 2022.</li></ul>
2.	<b>Stay Up to Date!</b>	Stay up to date with NGOsource! <a href="#">Subscribe</a> for updates so that you get the latest about NGOsource and international grantmaking.

Finally, thank you for choosing NGOsource!

If you would like a more detailed demonstration of how to place ED requests, please contact [accountsupport@ngosource.org](mailto:accountsupport@ngosource.org).

We look forward to supporting your organization's international giving!