

GRANTS MANAGEMENT SOLUTION APPLICANT GUIDE

Contents

GRANTS MANAGEMENT SOLUTION APPLICANT GUIDE.....	1
Access the Grants Management Solution.....	3
Register with the Grants Management Solution.....	4
New Applicant Profile Setup.....	5
Access Other Grant Request Dashboards.....	6
Applicant Dashboard and Request Tracking.....	7
Create a New Request.....	8
Example - Charitable Donation Information.....	9
Submitting a Request.....	12

Access the Grants Management Solution

Access to the **Grants Management Solution** will begin from the [NeoGenomics Corporate Stewardship](#) website. A website link will be available to Applicants to navigate from the organization’s website to the Grants Management Solution portal.

The **Grants Management Solution** portal will be the access point to all applicable types of requests.



Grants Management Solutions portal home page

Register with the Grants Management Solution

Applicants will be taken to the Login screen which will provide instructions on the left-hand side. If the user is already registered, they may simply log in via their email and password. Password reset is already built in. If the user requires to register, they will click the **Sign Up** button and complete the sign up form.

NEO GENOMICS

Promotional (Marketing) Sponsorships
Financial support provided only to institutions (not individuals) in an equal exchange for a promotional activity that benefits NEO (i.e., exhibit space, an advertisement displaying NEO's name and logo).

Sign In/Sign Up Instructions

For New Users:
By clicking **Sign Up**, you will be prompted to enter your email address and create a password. Once you have chosen your password, your account will be created and you will gain access to the portal.

For Returning Users:
Sign into the portal using the email address and the password you created when you originally signed up for the portal. If you have forgotten your password, click "**Forgot your password?**" and follow the prompts to reset your password.

Sign In

Email

Password

[Forgot your password?](#)

Need an Account?

GMS login screen

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Sign Up

Enter an email address and choose a password to create a new account.

Email

Password

- Must contain at least one lowercase letter
- Must contain at least one uppercase letter
- Must contain one number
- Must be between 8 and 32 characters
- Must not be an email address

Confirm password

Passwords must match


Add a short summary or full, multi-paragraph statement here eliciting user consent of this information before they register and log into the portal. You can include URLs to your existing [privacy policy](#) and [terms of service](#).
Workspace administrators can also generate a User Consent Report at any time.

GMS Sign up screen

New Applicant Profile Setup

Once the Applicant has registered for the first time, they will be requested to complete their user profile and will be able to access the **Dashboard**.

The system will not let an applicant proceed to create a new request unless they have completed their profile.



The screenshot displays the NEO Genomics homepage. At the top center is the logo, which consists of a stylized 'X' shape formed by two overlapping curved lines (one green, one blue) to the left of the text 'NEO GENOMICS' in blue and green. Below the logo is a navigation bar with 'Homepage' on the left and 'Welcome, IIS.applicant99@gmail.com' on the right, accompanied by a gear icon and a user profile icon. The main content area features a section titled 'Promotional (Marketing) Sponsorship' with a sub-header. Below this, there are two links: 'Switch to Educational Grant Request Portal' and 'Switch to Charitable Donation Portal'. A paragraph of text explains that to begin, the user should click '+Get Started' and that the status of their submission can be tracked by a color-coded status bar. A final line of text states, 'You cannot move forward until you have completed your Profile.' Below this text is a large, dashed rectangular box containing a blue button labeled 'Create a Profile to Get Started'.

Create a Profile option

Access Other Grant Request Dashboards

Navigation to other request portals will be displayed on the **Dashboard** (if applicable). Once registered, the user can pass between dashboards easily. They simply click on the other grant type to be taken to that dashboard.

A verification to continue to the dashboard will be displayed, once user selects to continue, they will be taken to the other grant request dashboard.



Homepage

Welcome, susan.quarles@neogenomics.com

Charitable Donation Request Portal

Financial support provided to tax exempt charitable organizations who are aligned with NEO's mission and generally involve educating medical practitioners, supporting programs in which patients are direct beneficiaries; and programs that relate to the prevention, detection and treatment of cancer and the role of radiation therapy in cancer treatment.

[Switch to Educational Grant Request Portal](#)

[Switch to Sponsorship Request Portal](#)

Accessing a different request dashboard

Return to Login ↗

Sign In/Sign Up Instructions

[Continue as IIS.applicant99@gmail.com](#)

If you are not [IIS.applicant99@gmail.com](#), please [Log Out](#)

New Users

By clicking **Sign Up**, you will be prompted to enter your email address and create a password. Once you have chosen your password, your account will be created and you will gain access to the portal.

Returning Users

Sign into the portal using the email address and the password you created when you originally signed up for the portal. If you have forgotten your password, click "**Forgot your password?**" and follow the prompts to reset your password.

Accessing a different request dashboard

Applicant Dashboard and Request Tracking

The applicant dashboard will allow an applicant to do the following:

- Gear icon (upper-right corner) – access a general help page and logout of system.
- **Profile Edit** – update profile information.
- **Add Another** button – create a new grant request.
- View and track previously submitted requests:
 - Statuses will be displayed for each request.
 - Requests that are returned to Applicant for more information will indicate in the status bar.
 - If a request is approved, but close out documentation is required after the event, the status will remain in the **pending close out** status until final documentation is provided.



Charitable Donation Request Portal

Financial support provided to tax exempt charitable organizations who are aligned with NEO's mission and generally involve educating medical practitioners, supporting programs in which patients are direct beneficiaries; and programs that relate to the prevention, detection and treatment of cancer and the role of radiation therapy in cancer treatment.


[Switch to Educational Grant Request Portal](#)
[Switch to Sponsorship Request Portal](#)

Please click "+Create a Profile to Get Started" to begin. You can always edit your Profile by clicking "Edit".
You cannot move forward until you have completed your Profile.

Profile	Complete	<input type="button" value="Edit"/>
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To begin, click "+Get Started" below. When you return to this Homepage, you can see the status of your submission by the colored status bar below the submission card.

- If the status bar is gray, your submission is under review, and no action needs to be taken.
- If the status bar is blue, there is an action required. Click on the Submission Card to complete.
- If the status bar is red, there is an error. Please reach out to the Administrator of this program.

 Add Another	<i>Untitled</i> <small>Created on 03/20/2023</small> Application In Progress	NeoGenomics : Charitable Donation <small>Created on 03/20/2023</small> Under Review
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Charitable Donation Request Dashboard

Create a New Request

Applicants can start a new request by clicking the **Add Another** button. This will open a new grant request form. Forms will vary based on the type of grant request.

Applicants can save draft requests and submit later. Once they have completed all required sections, the green **Submit** button will be available. Upon submitting the request, GMS will notify the NeoGenomics grants committee and begin the review process.



Order by: Newest to Oldest

Untitled

Request In Progress

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.

Sponsorship Request

Action Required

The button will update to reflect how you can interact with this step.

Requestor Information

Action Required

New Promotional (Marketing) Sponsorship request page

Example - Charitable Donation Information

Applicants will need to fill out the information required in the Charitable Donation Information and the Requestor Information.

Any items marked with a red asterisk are required. In the event that a required field is not applicable please enter "N/A". Required documentation must be uploaded. Any type of document (pdf, ppt, gif, doc, etc) is allowed but it cannot exceed 1,000 MB (**please note for educational grant requests all documents must be submitted in PDF Form**).

For each section (Charitable Donation Information & Requestor Information) fill out, select "Mark Complete" or to save without completing select "Save Draft."

Charitable Donation Information ▾

Save Draft

Mark Complete

Close

Please complete all required fields.

You can save as a draft and return later to complete by clicking "Save Draft" at the bottom of the page.

When you are ready to submit this step, please click the blue "Save" button at the bottom of the page.

Organization Name *
<input type="text" value="Add in Organization's Name"/>
Organization Website *
<input type="text" value="www.neogenomics.com"/>
<small>Please include the url address for the organization. If the organization does not have a website please enter N/A.</small>
Organization's Mission Statement
<input type="text" value="Please include the organization's mission statement"/>
Program / Event Title *
<input type="text" value="Program Title/Event Title"/>
Description of Request or Program *
<input type="text" value="Brief description of the request"/>
Program/Event City *
<input type="text" value="City of Event; if not for an event please enter N/A"/>
<small>Please enter the city that the program/event is being held. If this is not for a program/event, please enter N/A.</small>
Program Date *
<input type="text" value="07/05/2023"/>
<small>Please enter in the date of the program/event. If this is not for a program/event, please enter N/A.</small>
Date Decision Is Required By *
<input type="text" value="05/28/2023"/>
<small>*Please submit at least 10 business days in advance.</small>

Funding

Purpose of Funding *
<input type="text" value="Please include a brief description of the purpose of the funding/reason for request"/>
Total Amount Requested *
<input type="text" value="\$ 1,000.00"/>
Documentation
Request Letter on Organization's Letterhead *
<input type="text" value="+ Select a file"/>
W9 *
<input type="text" value="+ Select a file"/>
Letter of determination? If yes, then provide documentation below: *
<input type="text" value=""/>
Other Documents
<small>Other documents may include (but are not limited to): tax exemption documents, invoices, budget, etc.</small>
<input type="text" value="+ Select a file"/>

Save Draft

Mark Complete

Close

Requestor Information ▾

Save Draft

Mark Complete

Close

Last saved at 11:51:30 AM

Legal Entity Information

Legal Entity Name *

Enter the Entity's Legal Name

Address (Street 1) *

Address 1

Address (Street 2)

Address 2 (if Applicable)

City *

City

Country

United States

State *

California

Postal / Zip Code *

5 digit zip code

Requestor Information

Requestor First Name *

Requestor's First Name

Requestor Last Name *

Requestor's Last Name

Requestor Title

Phone Number (include area code) *

Phone number)

Email Address *

email address please note that this is where all emails related to this request will go. test@neogenomics.com

Is the contact the same as the requestor? *

Yes

Last saved at 11:51:30 AM

Save Draft

Mark Complete

Close

Submitting a Request

Once all information has been marked complete you can submit the application request.

Add in Organization's Name : Program Title/Event Title

Order by: Newest to Oldest ▼

Application In Progress Submit

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.

Charitable Donation Information Provide information related to the requested charitable donation	Complete	Edit
Requestor Information Provide legal entity and requestor information	Complete	Edit

You can check the status of your grant request by going back to the portal.



Homepage Welcome, susan.quarles@neogenomics.com

Charitable Donation Request Portal

Financial support provided to tax exempt charitable organizations who are aligned with NEO's mission and generally involve educating medical practitioners, supporting programs in which patients are direct beneficiaries, and programs that relate to the prevention, detection and treatment of cancer and the role of radiation therapy in cancer treatment.

[Switch to Educational Grant Request Portal](#)
[Switch to Sponsorship Request Portal](#)

Please click **"Create a Profile to Get Started"** to begin. You can always edit your Profile by clicking "Edit".
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- If the status bar is **red**, there is an error. Please reach out to the Administrator of this program.

	NeoGenomics : Charitable Donation Created on 03/20/2023 Under Review	Add in Organization's Name : Program Title/Event Title Created on 03/20/2023 Under Review
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