Texas Instruments Membership application instructions for grantees
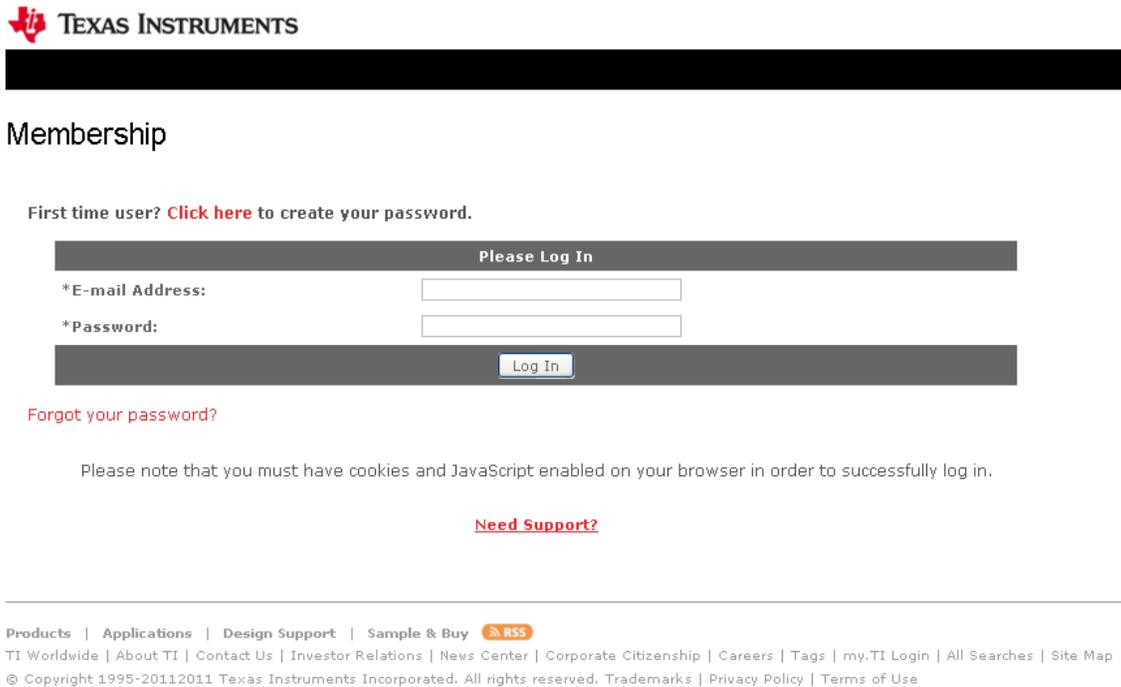
1] When you click on the Membership link on the ti.com/giving page, you are taken to the login screen shown below.

Here you have two choices:

A] If you are a first time user, follow the directions starting on page 2.

B] If you are already registered, follow the directions starting on page 4.

Both of these paths will eventually lead you to the Welcome page starting on page 5.

NOTE: There will be a "Need Support" link at the bottom of every page. Using this link will take you to a list of frequently asked questions and also allow you to email a question to the support staff.   The support staff is available to answer questions via email Monday – Friday, 8:30 AM – 5:30 PM Eastern Time. They will answer emails in the order in which they are received.

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A. FIRST TIME USER

1] If this is your first time applying to Texas Instruments for a membership, please click on the "First Time User?" button. (See screenshot below)

2] Clicking the "First Time User?" button takes you to the screen below where you select United States and click the "continue" button which takes you to the registration screen.

3] On the Registration Information screen shown below, you must complete the fields. When you get to the" IRS AND/OR NCES INFORMATION" heading, you must complete either the Tax ID field or indicate if you are with a K-12 school in the School District ID and/or the School ID field(s).   DO NOT COMPLETE BOTH IRS and NCES areas.

TEXAS INSTRUMENTS

Membership

Registration Information		
*First Name:		Enter your first name.
*Last Name:		Enter your last name.
*Telephone:		Enter your telephone number.
*E-mail Address:		Enter your e-mail address. You will need your e-mail address to log in.
*Password:		The password must be between 6 and 16 characters long and consist of letters, numbers or any of the following special
*Confirm Password:		characters: '@!#$-_'. The password "password" is not valid.
*Organization / School Name:		Enter the legal name of the organization for which you are applying.
*Zip / Postal Code:		Enter the organization's Zip/Postal Code.
IRS AND/OR NCES Information		
Tax ID (if applicable):		Enter the nine digit US Tax ID of the 501(c)(3) non-profit organization for which you are applying. If you do not know the organization's Tax ID, please contact the business office of the organization or call the IRS toll-free at 1-877-829-5500. If your organization is not located in the United States or otherwise does not have a US Tax ID number then leave this field empty.
School District ID (K-12 public schools and public school districts only):		For public schools, the District ID should be the first 7 digits of a 12 digit National Center for Education Statistics School ID. If you do not know the school's NCES information, please visit the NCES website.
School ID (K-12 public and private schools only):		For public schools, the School ID should be the last 5 digits of a 12 digit National Center for Education Statistics School ID. For private schools, the School ID should be the 8 digit NCES School ID. If you do not know the school's NCES information, please visit the NCES website.

Save   Cancel

* denotes a required field

4] Then click the "SAVE" button at the bottom.

➢ If one of the fields does not contain the correct data or you left a required field blank, you will receive an error message at the top of the screen telling you what field(s) you need to enter or modify.

➢ If all the fields contain the correct data, you will be taken to the Welcome page of the application. (See instructions starting on page 5).

NOTE: Clicking the "CANCEL" button will bring you back to the login page without saving any information entered.

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B. ALREADY REGISTERED

1] If you have already registered your email address and password, you must enter on the first screen the email address and password you created when you registered. (See yellow highlighted area in screenshot below).

2] Once you have entered the information, click the "LOGIN" button. (See green arrow in screenshot above). This will take you to the Welcome page of the application. (See instructions starting on page 5).

Note: The "Forgot your password?" link beneath the login area will ask for your email address and email you a temporary password if you have registered before. Otherwise it will let you know you have not yet registered.

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WELCOME PAGE

Entering the correct login credentials will take you to the Welcome page, shown below.

Go to the link at the bottom to begin the application process. Simply click the "START A NEW APPLICATION" button to begin.

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This will take you to the first section of the application called "CONTACT INFORMATION" where you can enter the information into the fields. Any field that has a "**(required)**" at the end must be completed or the system will not allow you to go to the next section and an error message will appear near the top of the screen.

When all the required fields have been completed, simply press the "Save and Proceed" button to continue to the next section of the application, the Contact Summary page where you will need to select which contact to associate with this request. (See green arrow below). Then click the "Save and Proceed" button to move to the next page.

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In the next section called "ORGANIZATION INFORMATION" some of the fields will be pre-populated with your organization information given during registration (if you have applied before, any changes made will be reflected here). You may edit the information shown and any field name with "**(required)**" after it must be completed in order to move to the next section of the application.

Welcome Page	Contact Information	Organization Information	Request Information

Organization Information

Legal Name (required)	Test Organization
Has your organizations's legal name changed in the past year? (required)	[dropdown]
Address (required)	
City (required)	Andover
State (required)	Massachusetts
Zip (required)	01810
Has your organizations's address changed in the past year? (required)	[dropdown]
Telephone (required)	
Fax	
Website Address	
Organization Description (required) In 200 words or less, please describe your organization's mission, experience in the field and key accomplishments.	[text box] 2000 character maximum
CEO/Executive Director (required)	
Board of Directors Please upload a Word Document with a list of your Board of Directors	Upload File (Click for instructions)

Save and Proceed

The yellow highlighted field in the screenshot above is an "Upload File" field where you must attach a file that will provide more details for the question being asked. Instructions on how to upload/attach a file to the application are shown over the next two pages.

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Upload File Directions

Click the Upload File link, and a new window will open. **Steps A – D** are shown in the screenshot below.
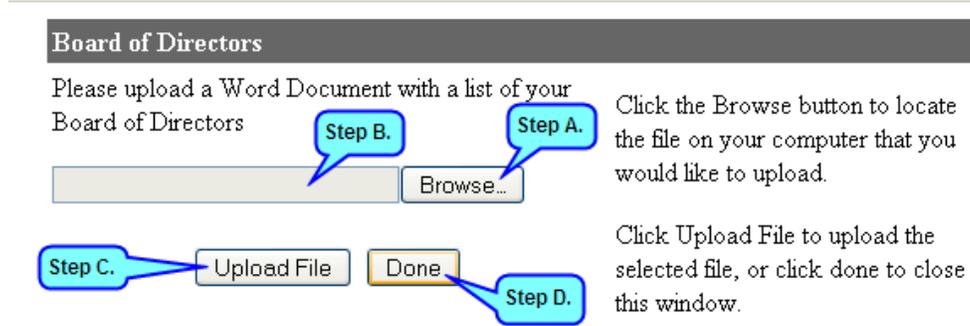
Step A. Click the browse button to locate the file on your computer that you want to attach to the application.

Step B. Once you find and select the file, and the name will appear in the box next to the 'Browse' button.

Step C. Click the 'Upload File' button. The screen will refresh, and a message will appear above the box telling you if the file upload was successful (see green highlighted area in screenshot below) and the file name will then display beneath the 'Upload File' and 'Done' buttons. (See yellow highlighted area screenshot below).
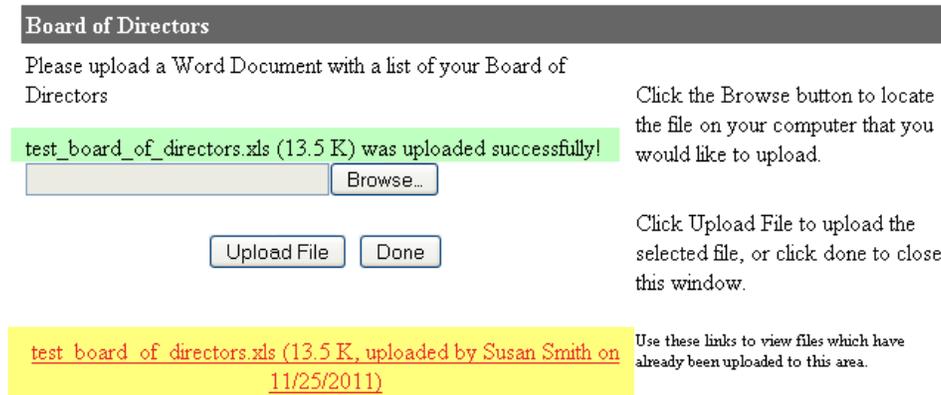
Step D. Click 'Done' button to return to the main screen. Screen will refresh and the file name will display in the field. See yellow areas in screenshot below.

Texas Instruments Membership application instructions for grantees

Organization Information	
Legal Name (required)	Test Organization
Has your organizations's legal name changed in the past year? (required)	No
Address (required)	123 Main St.
City (required)	Andover
State (required)	Massachusetts
Zip (required)	01810
Has your organizations's address changed in the past year? (required)	No
Telephone (required)	
Fax	
Website Address	
Organization Description (required) In 200 words or less, please describe your organization's mission, experience in the field and key accomplishments.	Our mission is... 1983 characters remaining
CEO/Executive Director (required)	Susan Smith
Board of Directors Please upload a Word Document with a list of your Board of Directors	Upload File (Click for instructions) • test_board_of_directors.xls (13.5 K, uploaded by Susan Smith on 11/25/2011) [Delete File]
	Save and Proceed

When you have completed the fields and are ready to move on click the 'SAVE AND PROCEED' button at the bottom of the screen. This will take you to the "ORGANIZATION BUDGET INFORMATION" section shown in the next screenshot.

Texas Instruments Membership application instructions for grantees

* indicates required field

* Current fiscal year/projected fiscal year end date

(MM/DD/YYYY)

* Projected revenue

* Projected operating expenses

* Most recent fiscal year completed/fiscal year end date

(MM/DD/YYYY)

* Most recent fiscal year revenue

* Most recent fiscal year expenses

* Sources of revenue from the most recent fiscal year end (list 100 of total operating revenue)   Must add up to 100

% Corporations

% Foundations

% Government

% Individual

% Other

If you selected other, please elaborate.

* Top five funders of your organization

[Add to List]

[Remove from List]

Please attach a copy of your organizations most recent 990   [Upload File]

[Save and Proceed]

When you have completed the fields and are ready to move on, click the 'SAVE AND PROCEED' button at the bottom of the screen. This will take you to the "REQUEST INFORMATION" section shown in the next screenshot.

Texas Instruments Membership application instructions for grantees

Please be sure and read the instructions beneath each field name carefully so you enter the data in the correct format.

Welcome Page   Contact Information   Organization Information   Request Information

Request Information

Title of Membership (required)	test membership app
First Year of TI Membership (required)	
Requested Amount (required)	
Lobbying amount *(if applicable)* (required) Please enter an amount in the field below. If this question does not apply to you, please enter "0" to complete the requirement.	
Prior Year's Membership Amount (required)	
Membership Commitment Start Date (required)	(MM/DD/YYYY)
Membership Commitment End Date (required)	(MM/DD/YYYY)
TI Board Members (required) Are there any TI employees or retirees who serve on your board?	Yes

List TI Board Members
Please list names of any TI employees or retirees who are serving on your board. Please type each name bseparately, selecting "Add to List" after each entry.
[Add to List] [Remove from List]

Name of TI Champion(s) if applicable
Please list names and titles of current board members and volunteers within TI. (If you do not have a TI champion , type "none"). Please type each name, separately, selecting "Add to List" after each entry.
[Add to List] [Remove from List]

Names of TI Members (required)
Identify all TI employees listed in your membership directory. You must add these names one at a time, clicking the "Add to List" button after each entry.
[Add to List] [Remove from List]

Membership Description (required)
In 300 words or less, provide a brief statement of your specific request (e.g., "The purpose of the membership is to...").
2000 character maximum

Benefits (required)
Please describe the benefits TI will receive at this level of membership (e.g., logo/listing on website, number of members, attendance at events, discounts to events, etc.).
2000 character maximum

Please electronically attach your invoice (required) Upload File (Click for instructions)
5MB limit (Please ensure your pop-up blockers are disabled to see the upload box)

[Save and Proceed]

Need Support?

Texas Instruments Membership application instructions for grantees

Once you have completed all the questions, click the 'SAVE AND PROCEED' button at the bottom of the screen to move to the next section called 'REVIEW YOUR APPLICATION'.

Because you may use the timeline shown at the top of every screen to jump between screens and answer the questions, the system double checks all required fields before allowing you to get to the review screen. Two things can happen depending on whether you did or did not complete all required fields. The two scenarios are described below.

❖ **IF REQUIRED FIELDS NOT COMPLETED**

If there are required fields that have not been filled in, you will be shown a screen that lists the section name(s) and the field name(s) that must be completed.

Clicking on the section name located in either the timeline (at top) or in the message area (at bottom) will take you back to that screen where you must complete the required field(s). You will need to either click 'Save and Proceed' on each screen until you get to the review screen or you may click on the last section in the timeline at the top of the screen and then click 'Save and Proceed' in that last section which will take you back to the Review screen.

In the example below, one field was not completed called "Telephone" located in the section called "Organization Information". (See blue arrows in screenshot below which show the two areas where you may click to go back to the section to complete the field).
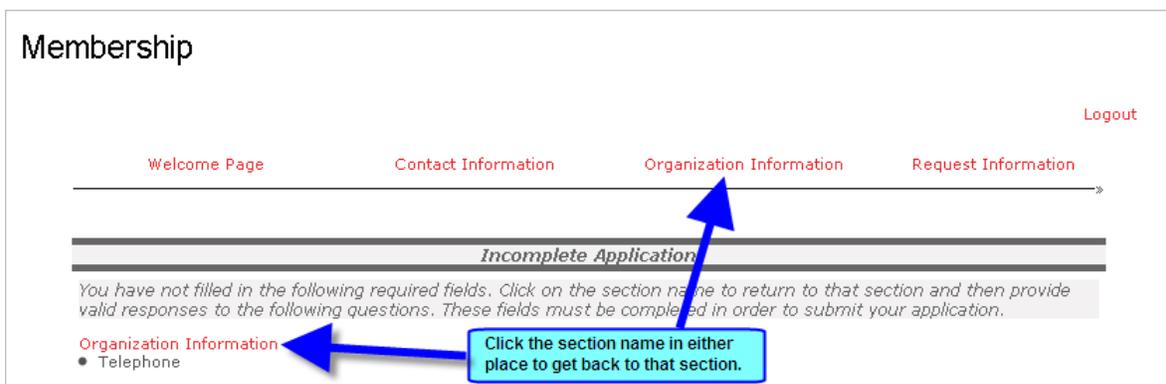
❖ **IF ALL REQUIRED FIELDS COMPLETED**

Texas Instruments Membership application instructions for grantees

If all the required fields are complete, you will be taken directly to the 'REVIEW YOUR APPLICATION' screen shown in the next two screenshots.

TEXAS INSTRUMENTS

Membership

Review Your Application
Please review your proposal information. If you are not ready to submit your proposal at this time, click the "Save Only" button. The proposal will then be available to edit from the Welcome page. Clicking the Submit button will immediately send the application to Texas Instruments and you will then be unable to perform further editing.

Contact Information	
Salutation (required)	Mrs.
First Name (required)	Julie
Last Name (required)	Jones
Suffix	
Title (required)	CEO
Telephone (required)	123-456-7891
E-mail Address (required)	jjones9@cyberg.com

Organization Information	
Legal Name (required)	Cybergrants Test Org
Has your organizations's legal name changed in the past year? (required)	No
Address (required)	234 Main St
City (required)	Andover
State (required)	Massachusetts
Zip (required)	01810
Has your organizations's address changed in the past year? (required)	No
Telephone (required)	123-456-7891
Fax	
Website Address	
Organization Description (required)	Our mission is to ...
CEO/Executive Director (required)	Julie Jones
Board of Directors	test_board_of_directors.xls (13.5 K, uploaded by Julie Jones on 11/25/2011)

| Request Information	
Title of Membership (required)	test membership app
First Year of TI Membership (required)	2002
Requested Amount (required)	$3.33
Lobbying amount *(if applicable)* (required)	$0.00
Prior Year's Membership Amount (required)	$3.33
Membership Commitment Start Date (required)	01/15/2012
Membership Commitment End Date (required)	01/14/2013
TI Board Members (required)	Yes
List TI Board Members	Gary Barrows
Name of TI Champion(s) if applicable	Sam Kendricks
Names of TI Members (required)	Sam Kendricks
Membership Description (required)	The purpose of the membership is...
Benefits (required)	The benefits will be...
Please electronically attach your invoice (required)	test_invoice.docx (12.35 K, uploaded by Juliet Johnson on 11/25/2011)

Submit   Save Only

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The Review Your Application screen shows all the answers for the entire application in read-only format so you may double check them. If you wish to modify any answer, simply click on the section heading, (i.e. ORGANIZATION INFORMATION, REQUEST INFORMATION), for that question, and the system will take you back to that screen where you can make your changes and save them. Then you will need to either click 'Save and Proceed' on each screen until you get to the review screen or you may click on the last section in the timeline at the top of the screen and then click 'Save and Proceed' which will take you back to the Review screen.

At the bottom of the review screen are two buttons, 'SUBMIT' and 'SAVE ONLY'. Each is described below.

SUBMIT – clicking this will send your application to Texas Instruments for review. When you click the submit button, the pop up shown below will display to let you know you will not be able to modify the application if you continue with the submission.
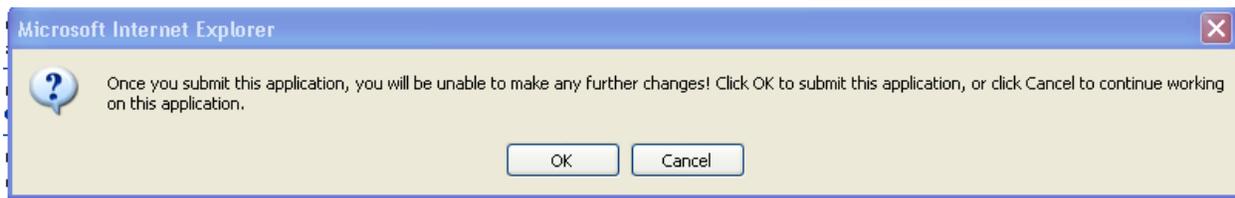
Clicking the "OK" button submits your application. The "CANCEL" button takes you back to the review screen without submitting the application to Texas Instruments.

Once you have submitted the application the screen will refresh and you will see a message displayed at the top. (See green highlighted area in screenshot below).

You may print this confirmation page for your records by going to the browser's menu bar and printing (i.e. in Internet Explorer & Firefox you would go to 'File' then the 'Print' option beneath it).

SAVE ONLY – this does NOT submit the application to Texas Instruments but allows you to return later to submit the application or make changes before submission.

Texas Instruments Membership application instructions for grantees

If you click the save only button, you are taken back to the Welcome page where you will now see the application you have worked on under the heading called "Applications Requiring Action". When you want to continue working on the application or you want to submit it you must click the 'Continue' link to the left of the project title (see green circle in screenshot below). You will then be able to navigate through the screens via the timeline or by clicking Save and Proceed at the bottom of each screen.

NOTE: To see or print out an application that you have submitted, go to the Welcome page and near the bottom under the section called "Submitted Applications" you will see the application you have submitted to Texas Instruments. To see the details or print out a copy of the completed application click on the 'View' link (see blue circle in screenshot above). This will take you to a read-only screen just like the Review application page where you may print by going to the browser's menu bar and printing (i.e. in Internet Explorer you would go to 'File' then the 'Print' option beneath it).

To work on an application that was started but not submitted:

Next time you want to work on an application you will use the same URL to get to the login screen where you will enter your login information and invitation code and click the login button.

On the Welcome page you may work on an application that you started previously but have not yet submitted by going to the portlet with the heading of "APPLICATIONS REQUIRING ACTION " and clicking the 'Continue"' link next to the application you wish to complete. Once in the application you will go from screen to screen and submit as described previously in this document.