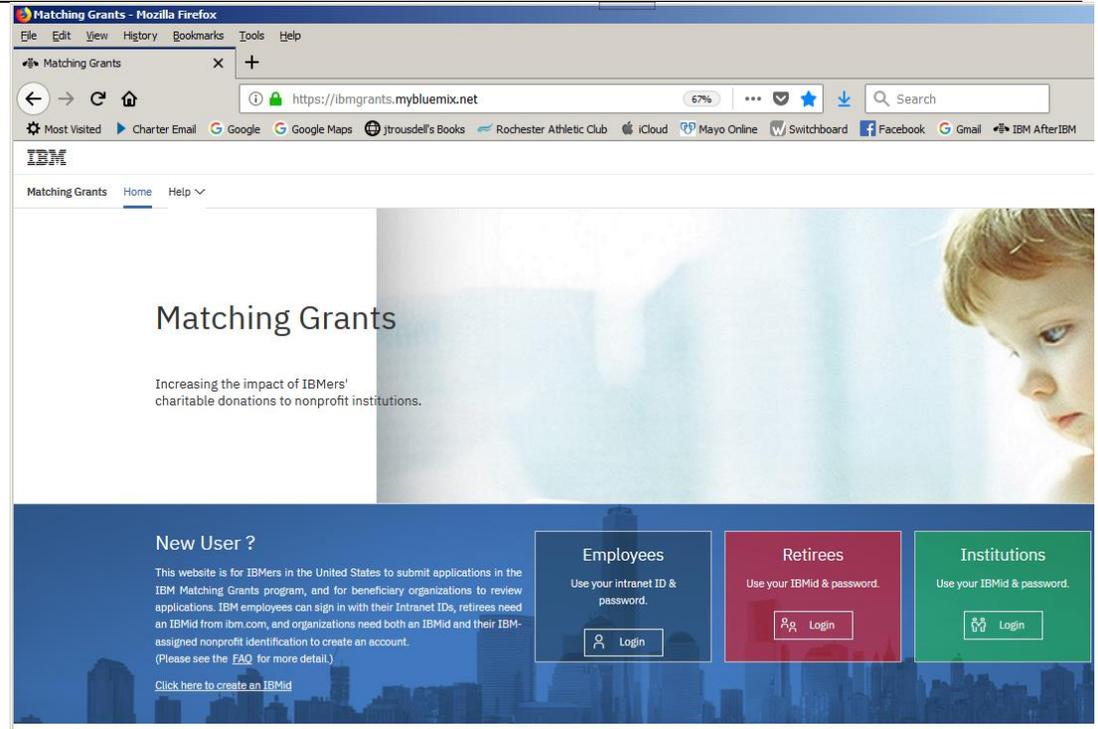


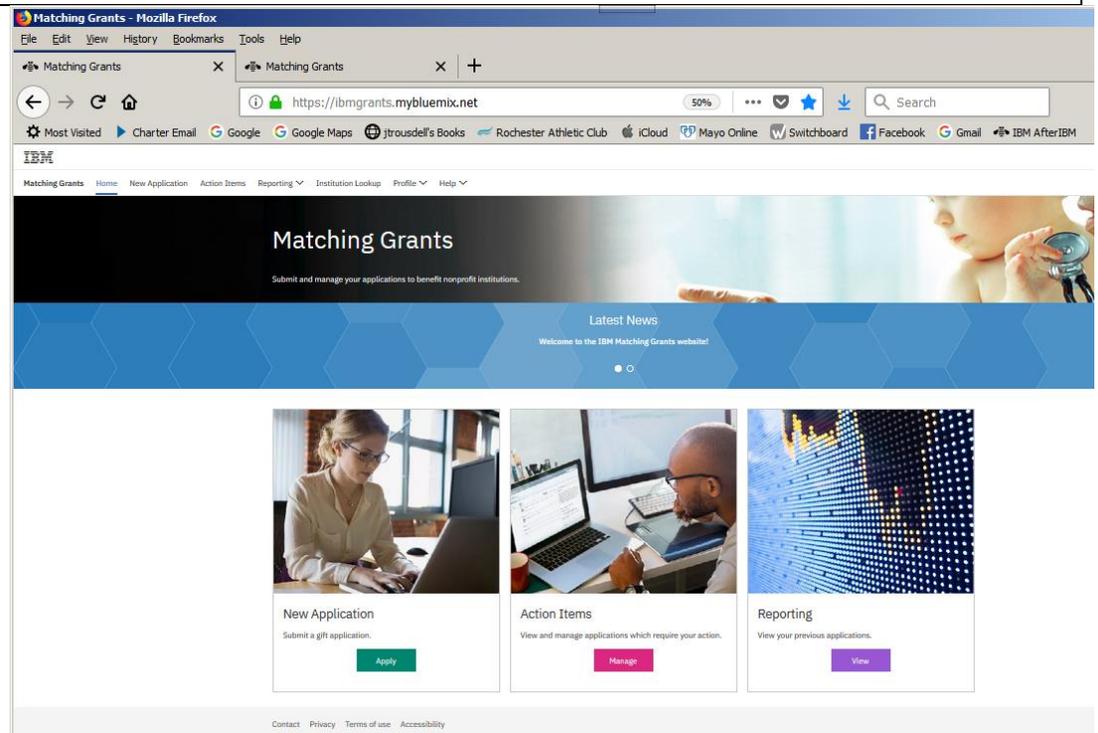
How to Submit an IBM Matching Grant Online

This document is intended to help folks who might have been unsure how to submit a request for a Matching Grant from IBM now that the process is online versus the paper copy that was used before. There was a drop off in folks requesting Matching Grants last year after IBM transitioned to online which is why we thought this might be of help. The sample screens and tips I am providing are based on the path if one is retired from IBM. I would assume the current employee path is similar. My screen shots are based on using Mozilla Firefox but I assume other browsers will look similar. If you have any questions on this material, please contact the author, Judy Trousdell, at jtrous1a@charter.net.

First, you will need to go to the IBM Matching Grants website at <https://ibmgrants.mybluemix.net/>. That screen is shown in the right column. If you are currently employed by IBM, you can use your Intranet ID. If you are retired, you will need an IBMid. If you do not currently have an IBMid, you can go to the lower left portion of this screen and click on 'Click here to create an IBMid'. Once you have an ID, click on the login box in the blue box for current employees and the pink box for retirees. You will be asked to enter in your ID and password, please do so.



After logging in, you will now be on a screen which looks like this. To submit your request for a matching grant, click on the teal green box in the lower left which says 'Apply'. A 'Terms and Conditions' box will appear, scroll down to the bottom of that box (use scroll bar on the right) and click on the box which says 'I agree'. Note: I am not showing that box in these sample screens.

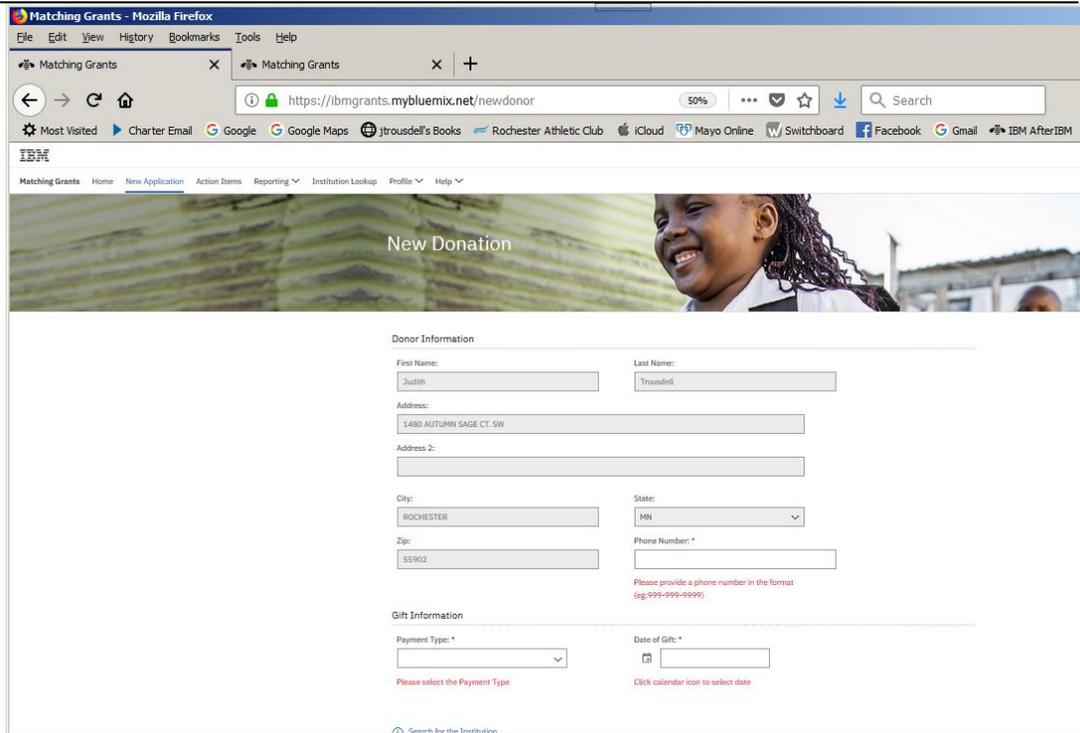


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You should now see a screen like this which says 'New Donation' at the top.

The first time you come to this screen, you will need to enter in your name and address information. This information will be saved and will automatically be there for subsequent donation requests. For some reason, the phone number is not saved so you will need to enter that every time.

After the address information, is the Gift Information section. Let's scroll down to see all of that.



The screenshot shows a Mozilla Firefox browser window with the URL <https://ibmgrants.mybluemix.net/newdonor>. The page title is 'Matching Grants' and the main heading is 'New Donation'. The form is divided into two sections: 'Donor Information' and 'Gift Information'. The 'Donor Information' section includes fields for First Name (Judith), Last Name (Trousdell), Address (1480 AUTUMN SAGE CT SW), Address 2, City (ROCHESTER), State (MN), and Zip (55902). There is also a field for Phone Number with a note: 'Please provide a phone number in the format (eg:999-999-9999)'. The 'Gift Information' section includes a 'Payment Type' dropdown menu and a 'Date of Gift' field with a calendar icon. At the bottom of the page, there is a search bar for institutions.

To fill in the fields of interest:

For 'Payment Type', select the pull down (down arrow) to say if it is 'Cash/Check/Credit Card' or Stock ('Securities').

For 'Date of Gift', click on the calendar and select the date of interest, then press OK. It defaults to today's date.

For 'Tax-Deductible portion of the Gift', enter in the value in the form of nn.nn or nn, e.g. 100.00 or 100 for \$100.00 donation.

To identify the Library as your donation institution,

Under 'Institution State', use the pulldown to select MN (Minnesota)

Under 'Institution Search Keyword', enter 'Rochester Public Library' and it should show a box with 'Rochester Public Library, Rochester MN, Active Donee'; select that box. Selecting that box should trigger filling in the section titled 'Institution Detail' with the appropriate address information. You **do not** need to change any of this data.

At the bottom of the screen is a section titled 'Certification' with a box that you will have to check mark (click on the box) which says the information is all correct and this is a personal contribution etc.

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This is now the lower half of the previous screen. I am showing it after I have filled in the information as described above.

Scrolling down just a little further you will then see a Submit button, select that button.

You will now see a screen which is a confirmation of all that you entered which looks like this.

If you see something which is incorrect, select the 'Edit' button at the bottom of the pscreen and it will take you back to the previous screen for changes.

If everything is correct, check mark the box to the left of the 'I have reviewed and verified the application' statement and then select the 'Submit' button. This button is only active after you have checked the box.

And then you are done! Hurray! You will receive an email (from mgrants@us.ibm.com) which tells you the request was successfully submitted. Your submission will trigger a request be sent to the library to confirm your donation. When they confirm it, you will see another email which says it was confirmed. If there are any problems, you will see emails about that as well.

If you want to look at the status of your donation to the library (or anywhere else), you can select the Menu option 'Reporting' with the pulldown selection of 'In Progress' or 'History' or 'Everything'. I often use 'In Progress'.

When done, you can exit by clicking on the blue 'person' icon in the top right corner of the screen and selecting Logout.