Survey Monkey Apply Instructions

This resource will provide links and step by step instructions to help you navigate United Way for Southeastern Michigan's grant management portal, Survey Monkey Apply.

To access Survey Monkey Apply, please visit: https://apply.unitedwaysem.org/

Resource Items:
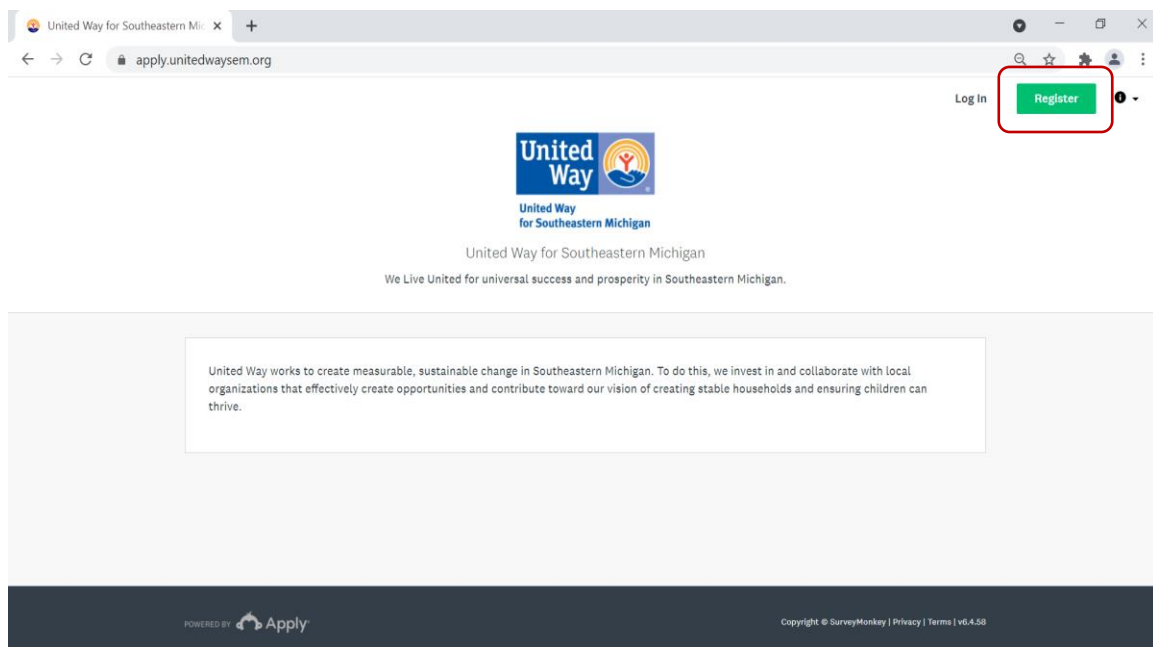
1. Creating an Organizational Account
   - *If you are new to SMA start here.*
2. Adding Individuals to Your Organizational Account
3. Resetting Your Password
4. Starting Your Organization & Financial Information
5. Locating Your Open Applications & Reports
6. Navigating Your Application
7. Creating an Organizational Account via My Setting
8. Technical Assistance

Creating an Organizational Account

If you are certain that your organization has not been registered in UWSEM's grant management portal Survey Monkey Apply, please follow the below steps. If you are uncertain or would like to confirm if our organization has not been registered in the system, please email sma@unitedwaysem.org to avoid creating a duplicate profile.

1. Visit the Survey Monkey Apply website: https://apply.unitedwaysem.org/
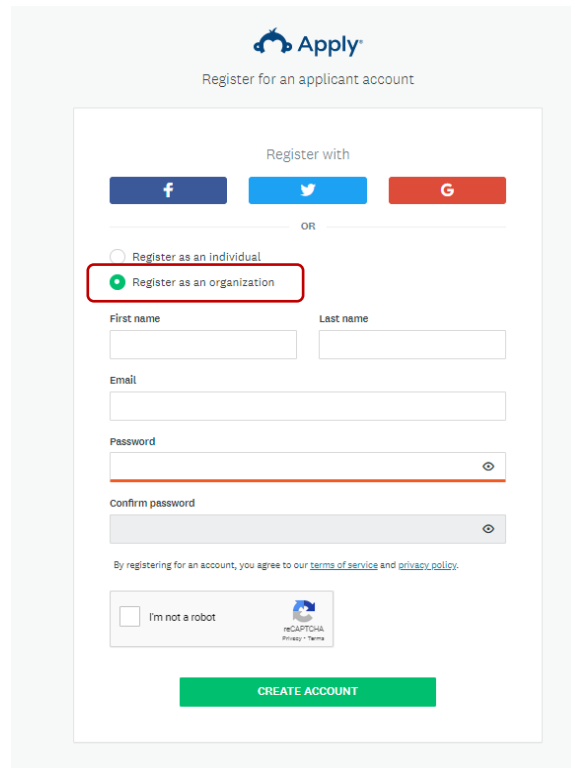
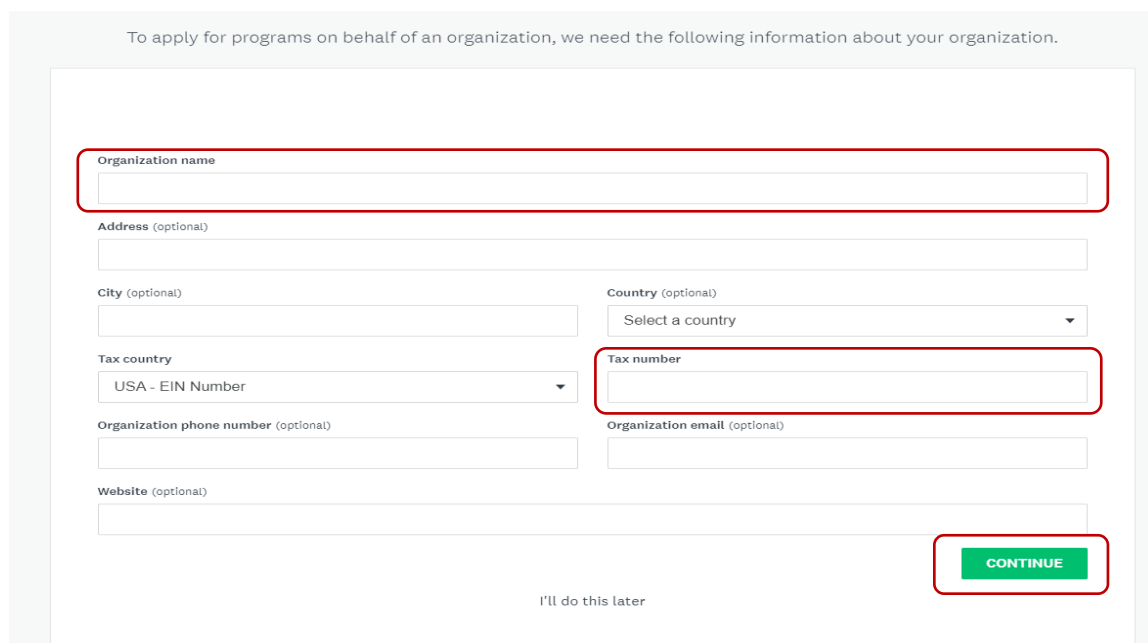   Select the green, **Register** button.

2. Make sure to select **Register as an Organization**. For most of our grants, you must be registered as an organization to be granted access to the application.

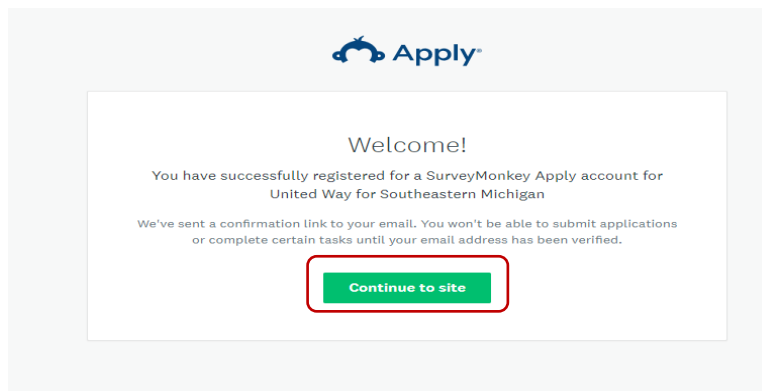Complete the form and select, **Create Account**.

3. At this time, the only required field is the <u>Organization Name</u> and <u>Tax Number</u>. You can select **I'll do this later**, however; it is highly suggested that this is completed as part of your registration.
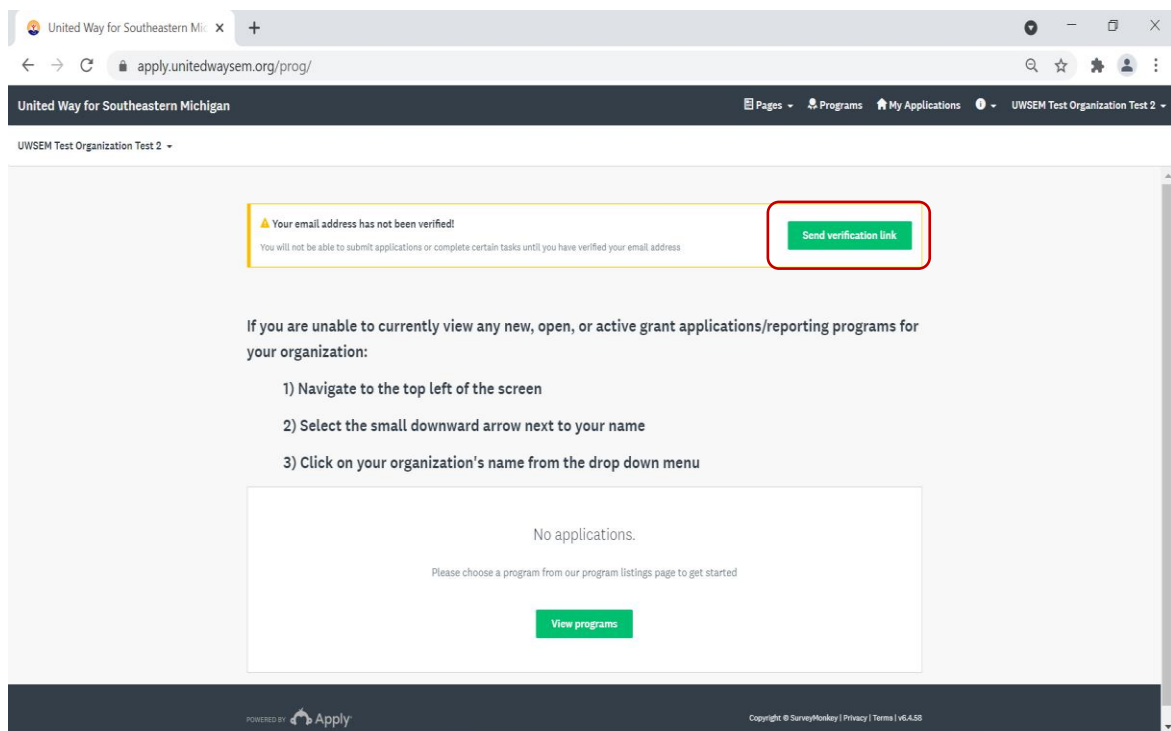
When finished, select **Continue**.

4. A new page will open, select **Continue to Site**.

5. The final step of the process is the verify the email address provided.

   Select **Send Verification Link**.

6. You will receive the referenced email from noreply@mail.smapply.net (it is not uncommon for these emails to hide out in the spam/junk folder).

Select **Confirm Email Address**. You will be taken to a webpage with the verified message, select **Continue** and your registration will be complete.
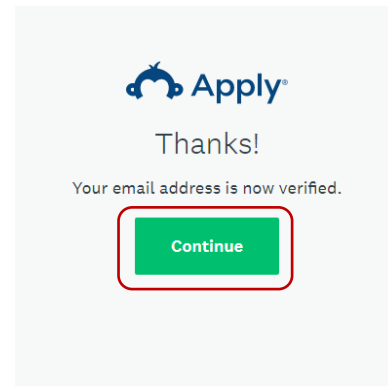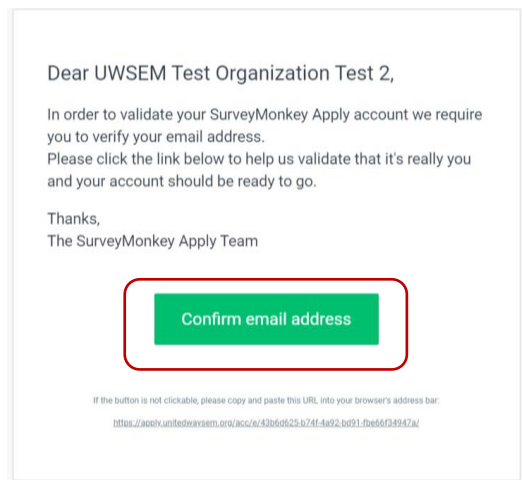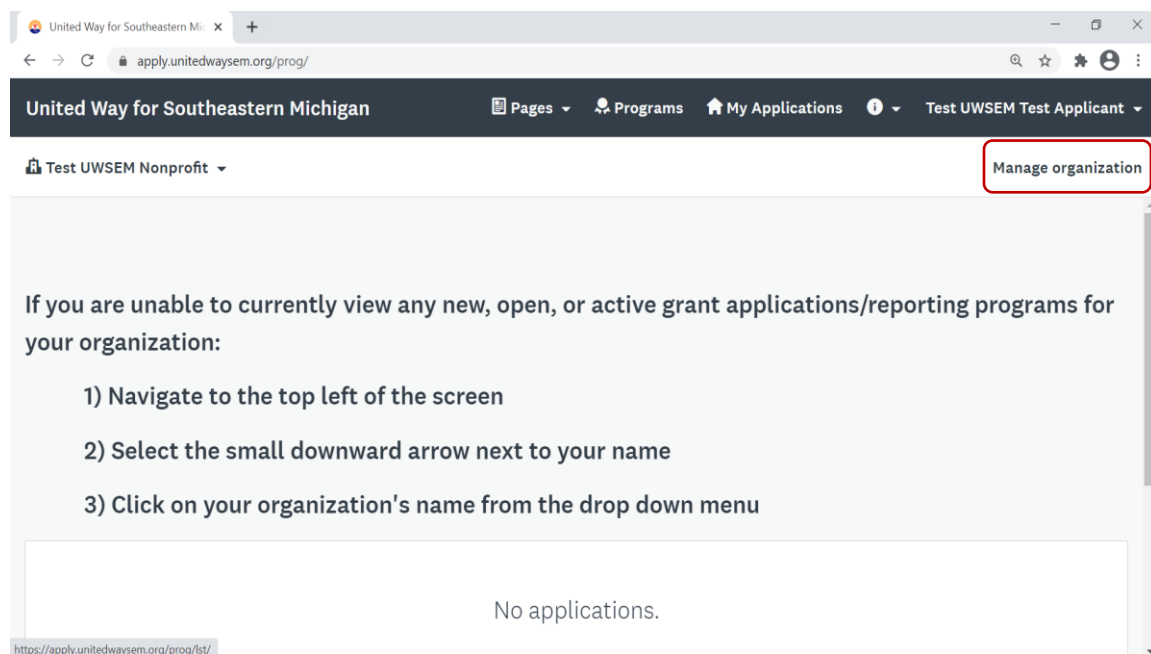

Adding Individuals to Your Organizational Account

SMA allows for teams to work on applications, reports, etc. The Organizational Account's Primary Administrator (1st Individual to set up account) is the only person that can add additional individuals to the account.
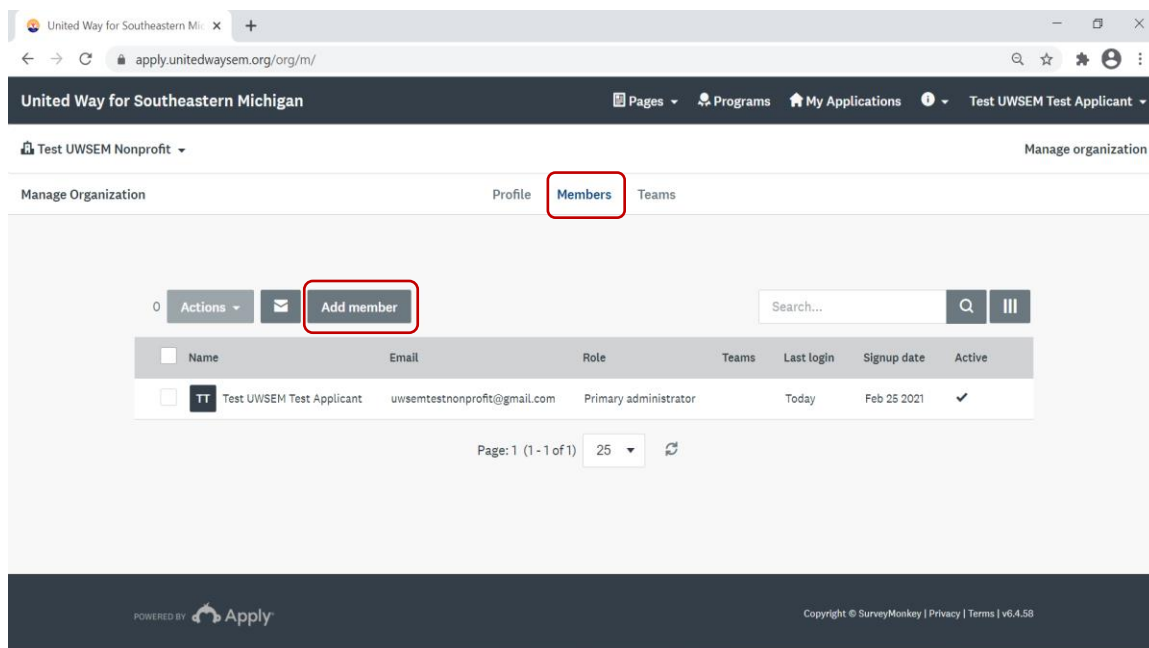
1. From the primary administrator's homepage, select **Manage Organization** (top right corner).

Note: Only the primary administrator will have this link and be able to complete this task.

2. Select **Members.** At this point you will be able to see all the individuals connected to your organization's account.

    Select **Add Member**.

3. A new box will pop up. Complete with the name of the individual you intend on link to the account.
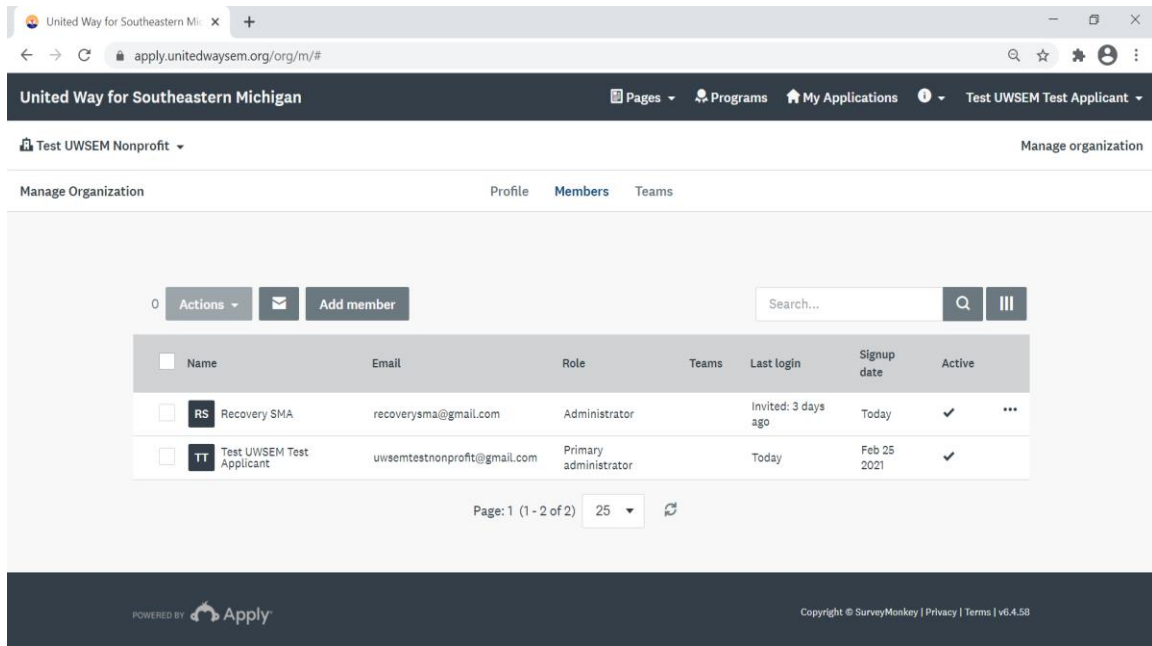
    Determine the role you would like them to have:
    - **Primary Administrator:** This is the organization member that initially creates the Organization and has full administrative control over the organization's members and applications. They will be able to transfer ownership of the organization, as well as edit and remove members of the organization at any time. They will be the primary contact for the organization.
    - **Non-Administrator Role** –These members have similar control over the organization's members and applications as the Primary Administrator. However, they will only be able to edit and remove non-administrative members, or inactive Administrators.
    - **Administrator Role** - These members will be able to edit applications on behalf of the organization but will not have access to manage the organization's profile and members. They will also not be able to create or submit applications for an organization.

    Make sure to select **Notify member by email they have been added,** as this lets the individual know they need to go in and finalize their registration process with SMA.
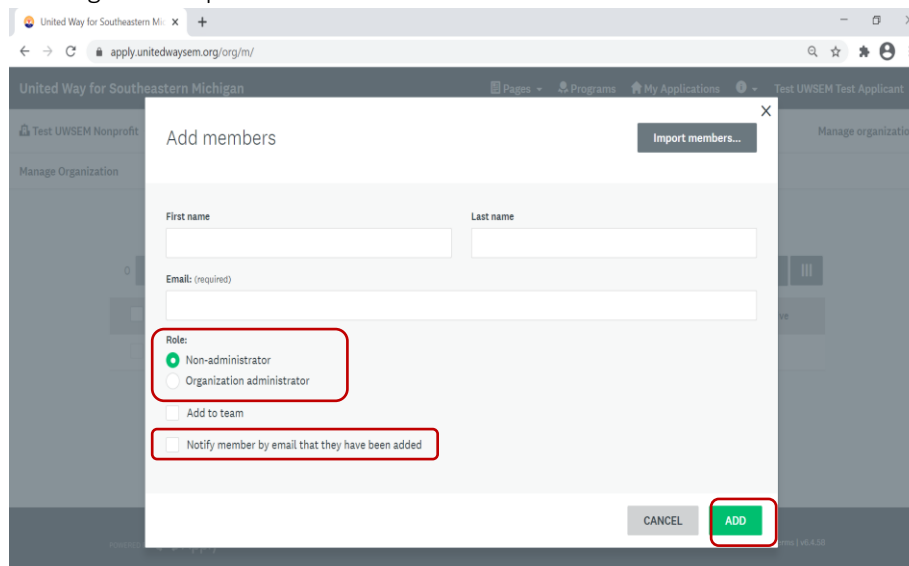
4. If an individual is successfully added they will now appear under the organization's member tab.

5. The added individual will receive the above message from noreply@smapply.net , by selecting the **Join Now** button it will take them to a registration page to complete the process.
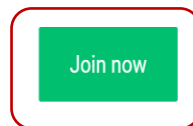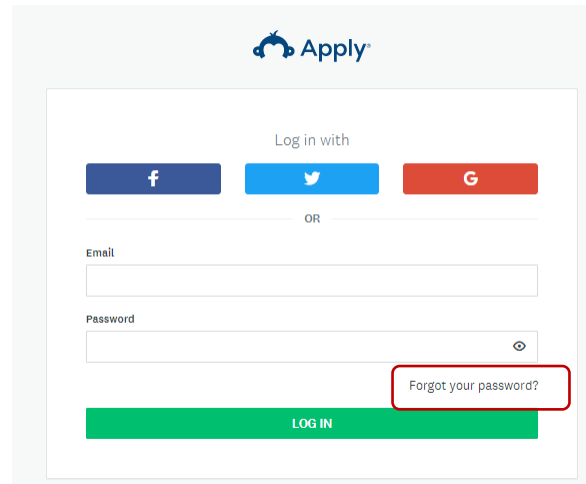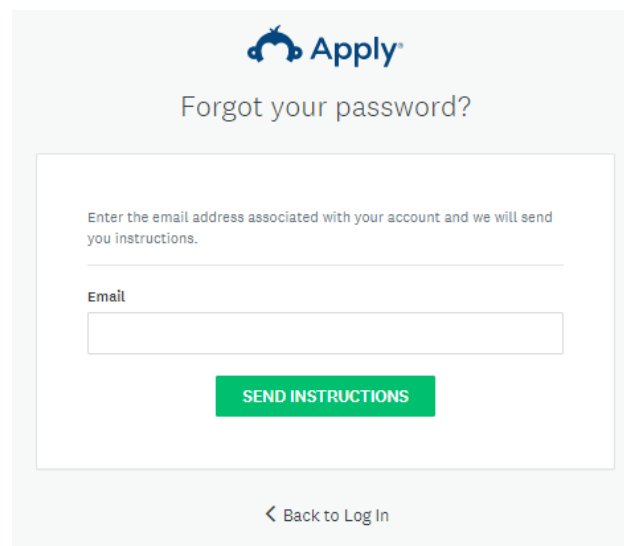
Resetting Your Password

In the case you have forgotten your password, the below instructions will provide guidance as to how to reset it.

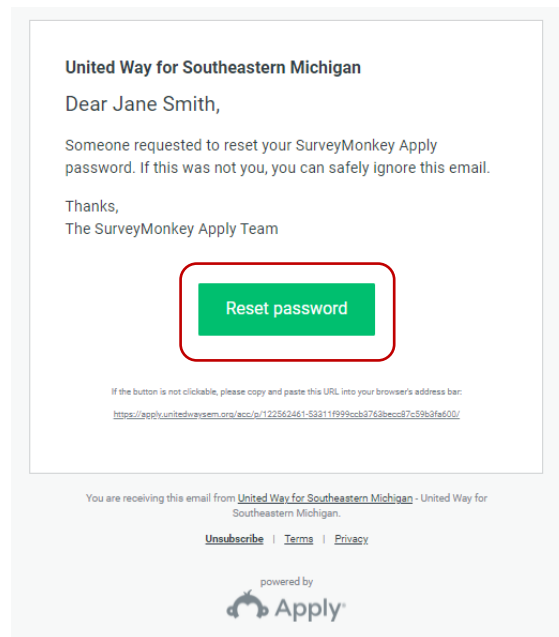1. On the SMA log in page, select the **Forgot Your Password**? Link

2. A new page will open, input the email associated with your SMA account and select Send Instructions.

3. You will receive an email from noreply@mail.smapply.net with details on how to reset your password, upon receiving this click the green Reset Password box in the body of the message.


4. You will be brought to a new page with the opportunity to input a new password. After creating your new password, select the green **Reset Password** button. You will then be brought to the login page, where you will login using the newly set password.

5. You will receive 2 methods of confirmation of your password reset: 1) An email notification from SMA 2) A message on your SMA homepage.
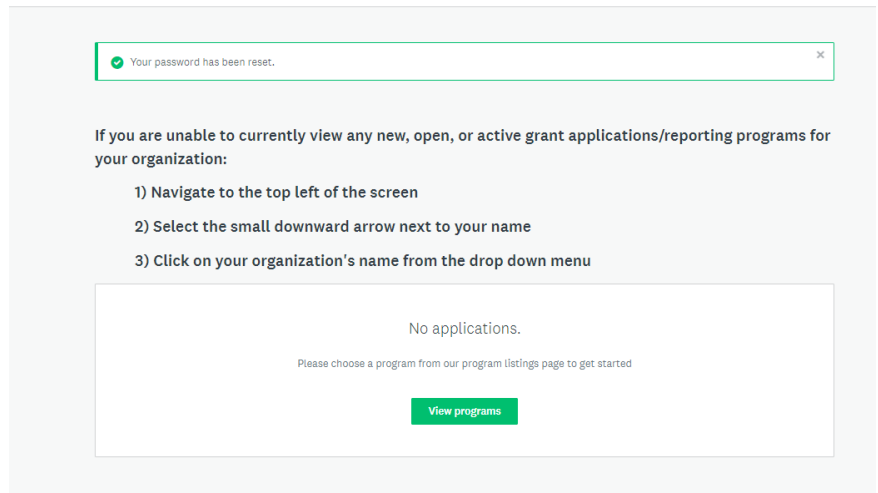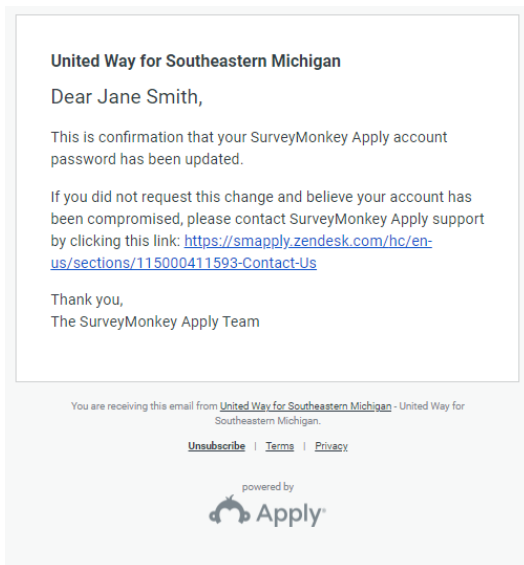
Starting Your Organization & Financial Profile

These instructions are specific to organizations that have not completed an Organizational & Financial Profile in the past.

****If you have not completed this profile, start here prior to completing a grant application. ****

1. After logging into your SMA account, you will see your homepage.

   Locate the **Programs** tab in the header and select.

Note: You will notice that it always reads "No Applications", even once you open applications. That is because you are currently looking at it from an individual view. To switch to Organizational View, select the downward arrow next to your name in the top left corner – select your organization's name from the provided drop-down menu. A new page will open featuring open and past program tiles.
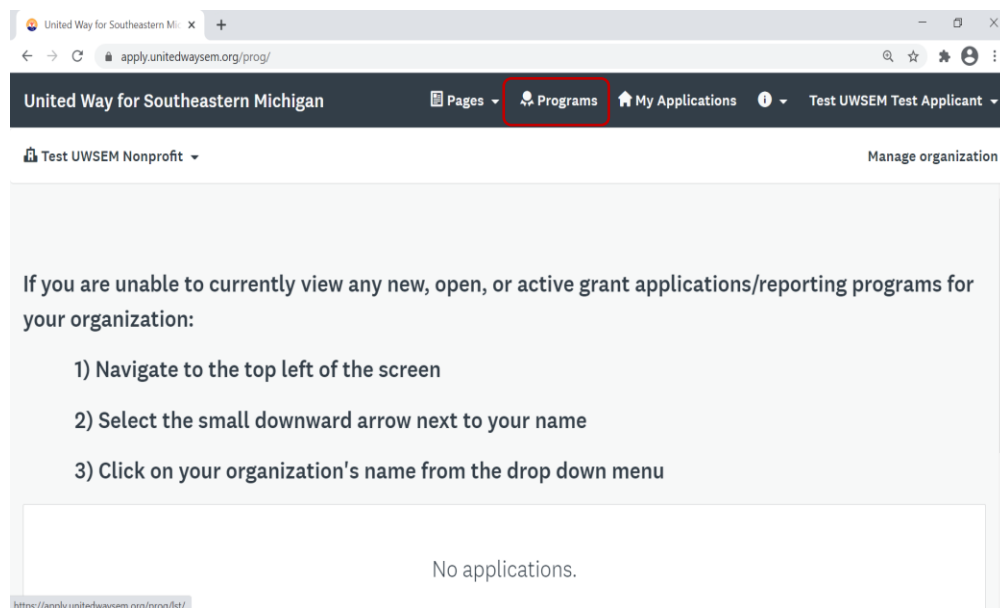
2. By selecting Programs, it will take you to the page with all of our current open RFP funding opportunities.

If this is your first time in SMA, or you have yet to complete the Organization & Financial Profile – you will select the green, **More** button. This is also where you will be able to access your identified grant application.
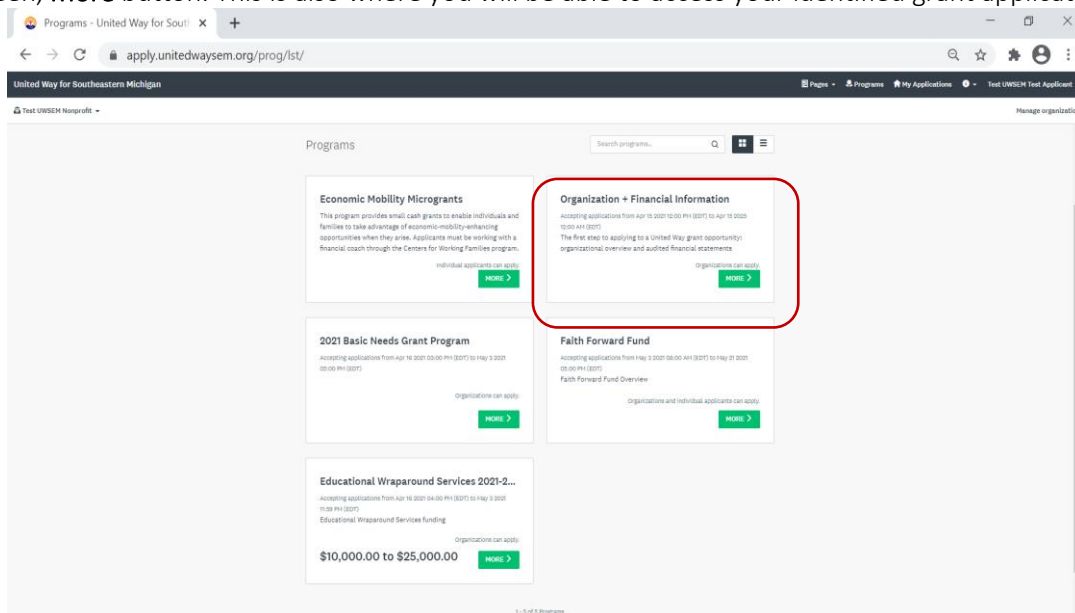
3. Details will be provided for the associated program.

Make sure to select **Apply**. Now, the application has been added to your Organizational Profile.

Note: If you are not able to see or select an Apply button, you may have set up an Organizational Profile completely. Please see instructions for setting up an Organizational Account via My Settings.
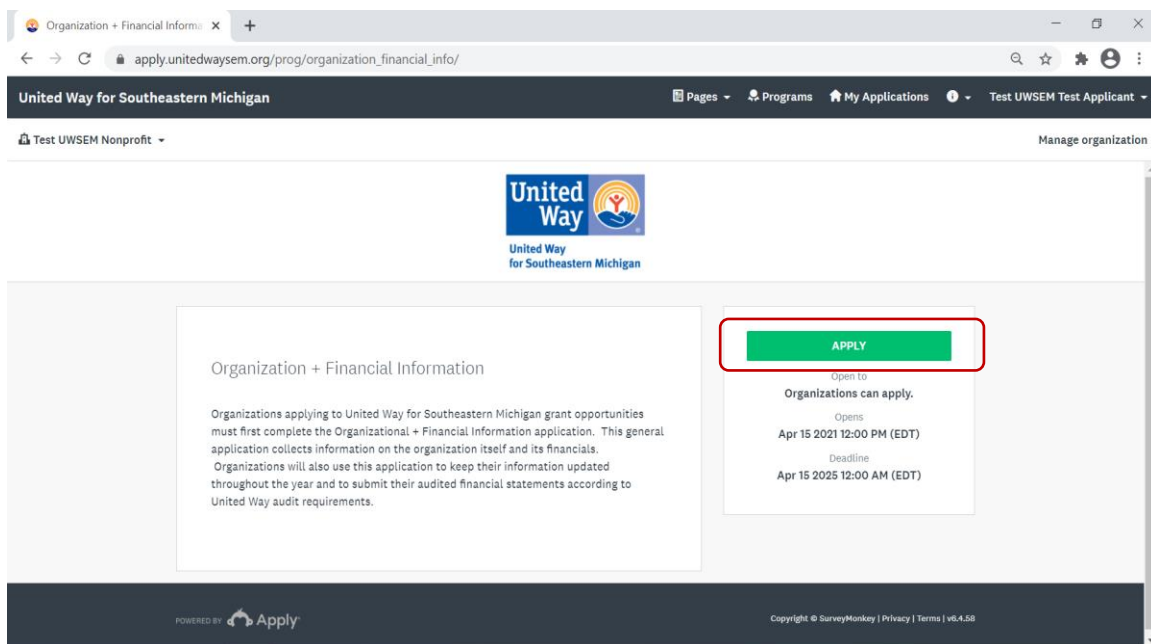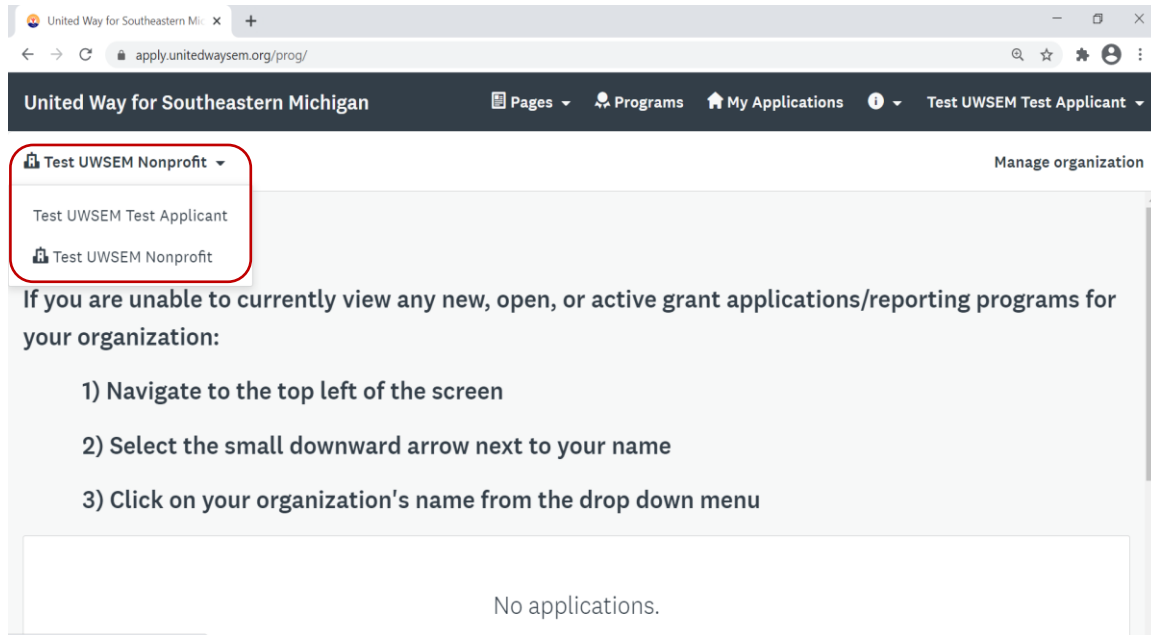

Locating Your Open Applications & Reports

For times when you are just logging into SMA, you will see a white box that reads, "No Applications". Do not panic – you are currently in individual view and need to navigate to organizational view.
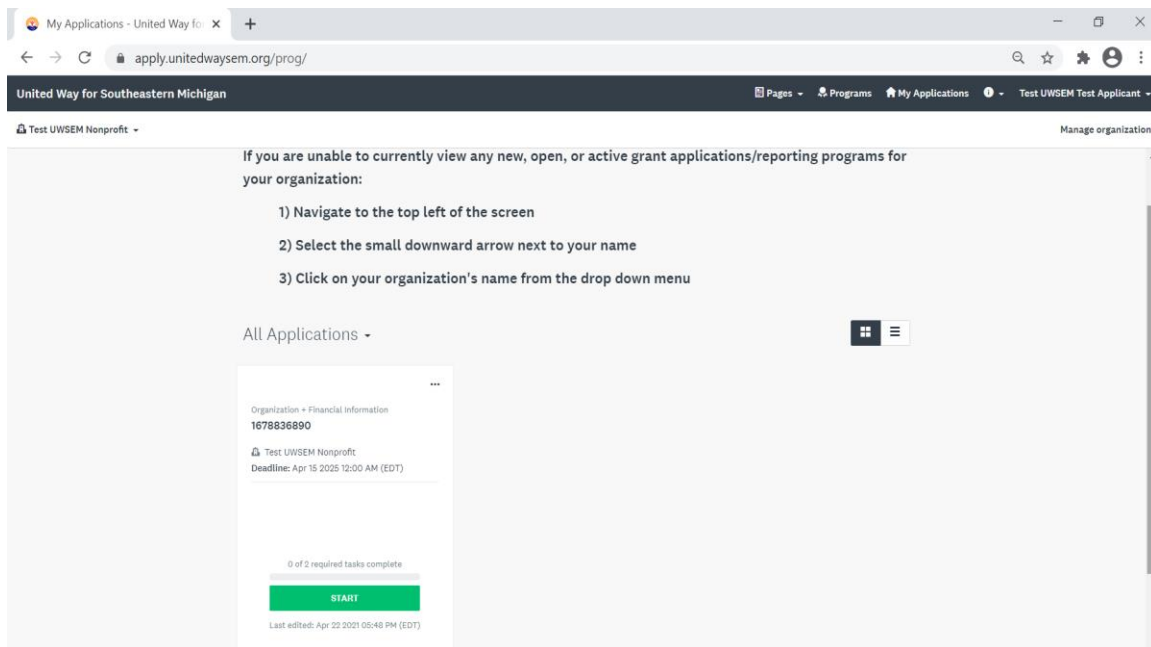
1. Click the small arrow next to your name in the top, left corner.

   A drop box will appear.

   Select your **Organizations Name** (it has a tiny building icon next to it)

2. A new page will load, which will include your organization's applications, reporting programs, etc.


Navigating Your Application

This section captures the elements of each program application, while some of the individual tasks/questions may differ based on individual programs the overarching elements and layout will remain the same.

1. After opening a program application/report, the first page presented will provide an outline or face sheet with the following items:
   a. Application Tasks (Green box)
   b. Task Status Bar (Blue box)
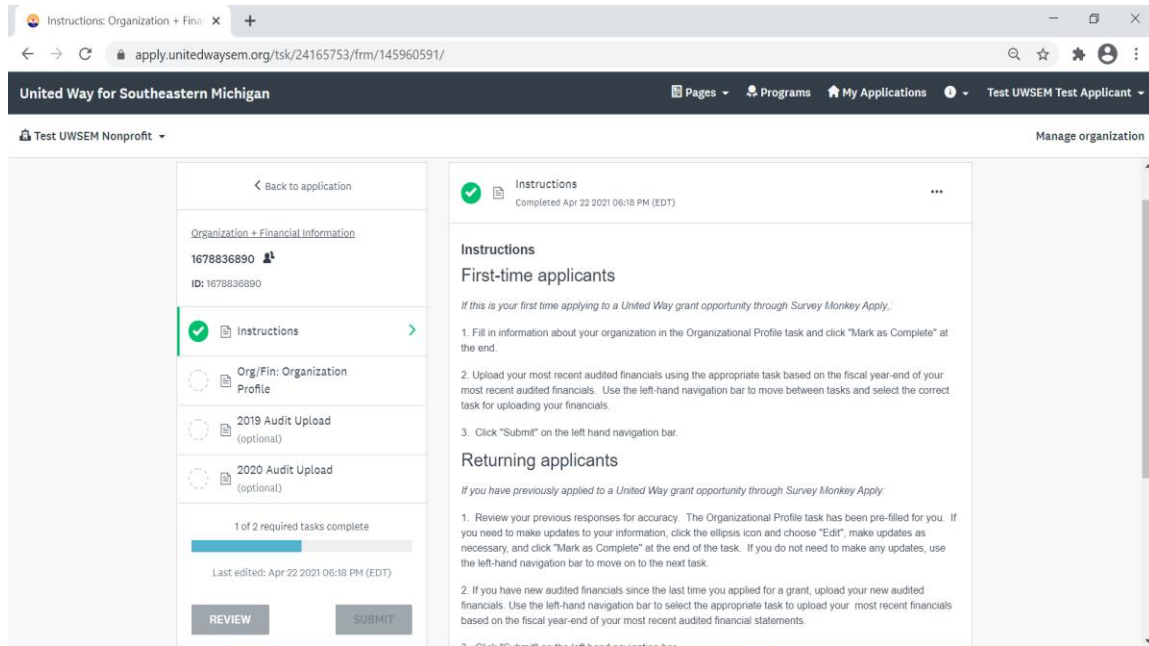
c. Team/Team Members Assigned. (Orange Box)
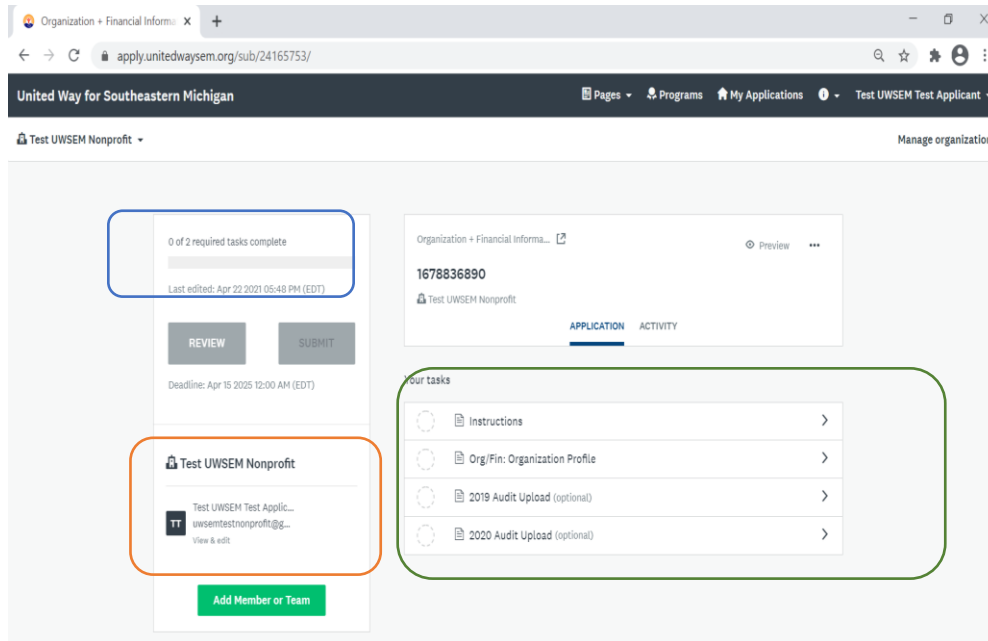
2. At the bottom of each screen, you will see a **Save & Continue Editing** button and either a **Next** or a **Mark as Complete** Button.

   *While SMA is supposed to save as you go through the application, I advise you to always hit that **Save & Continue Editing** button before hitting the green button.*
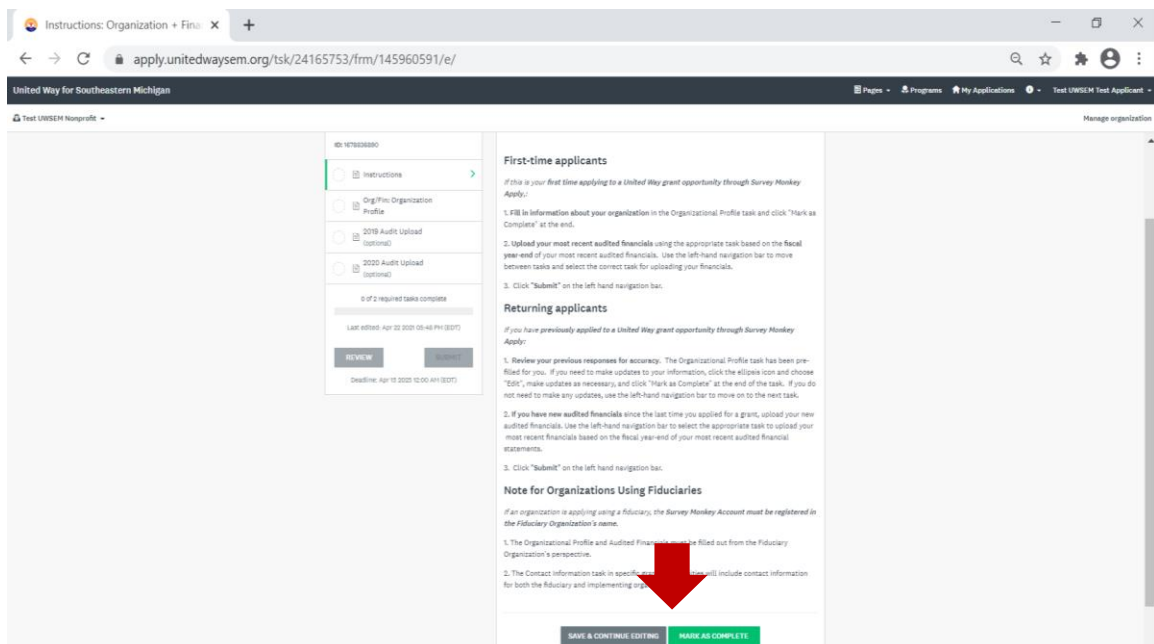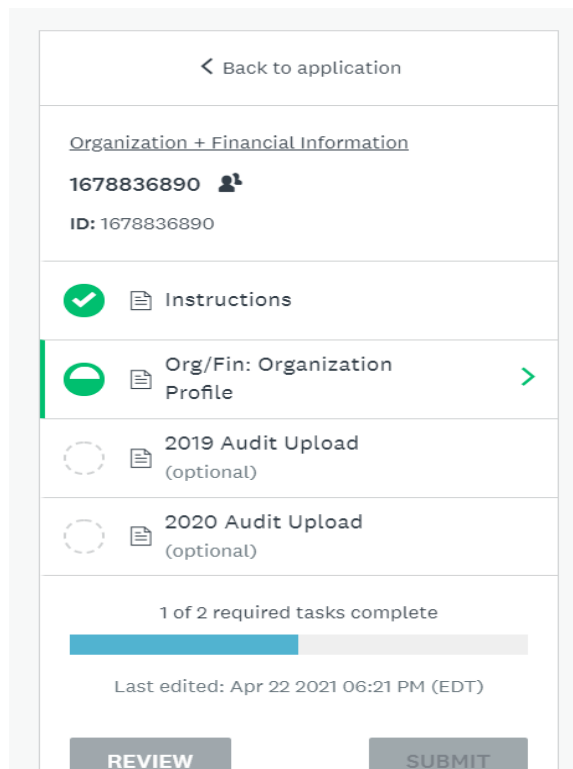

3. Once the task is marked as complete, the grey dashed circle will be replaced with a green/white check mark.

   Once all required tasks are completed and show the check marks – the greyed out **Submit** button will turn green and be available to select.

*Note: To edit a previously submitted task, select the **ellipses** (…) in the top right corner of the form you would like to edit. Forms can be edited after saved but the entire application has yet to be submitted, however, if once an application is submitted it can not be edited unless reopened by UWSEM administrators.*

4. A half-filled task button (half white/half green) indicated that either portions of this task has yet to be completed OR the applicant has not selected the **Mark as Completed** button at the bottom of the form.
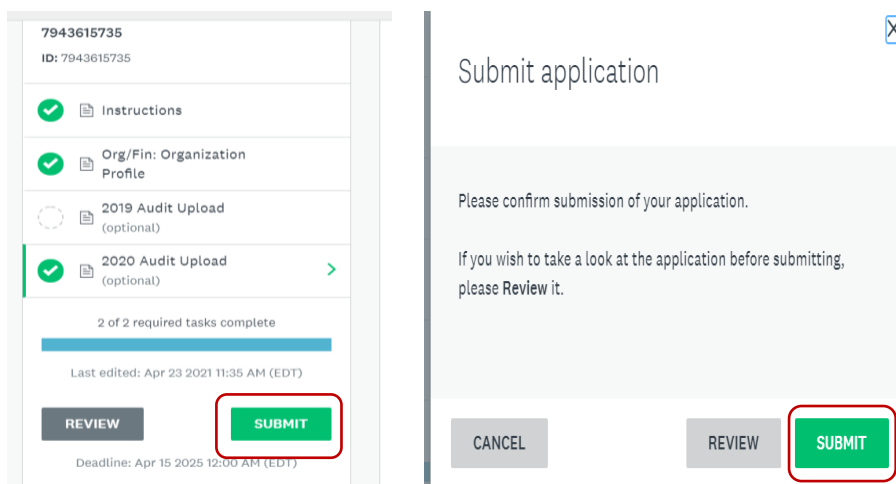
   As you move through the application, the status bar will populate indicating how far the applicant is in the process.

5. When all required tasks are completed, the task bar will be filled blue. The Submit button will turn from grey to green.

    After selecting **Submit**, a pop-up box will appear. You will be able to do a final review (if preferred), as well as submit the completed application.

    Select the green, **Submit** button.

6. After you successfully submit your application, a new screen will open indicting the confirmation of receipt.

    Now when you look at your organization's application's the program tile will indicate that it has been submitted.

    Note: Application/Primary Administrators should receive generated emails from SMA indicated that UWSEM has received your submission – however, sometimes these are delayed or like to hide in the spam/junk folder. As long as you see the submitted status on your program tile, know your application has been received.
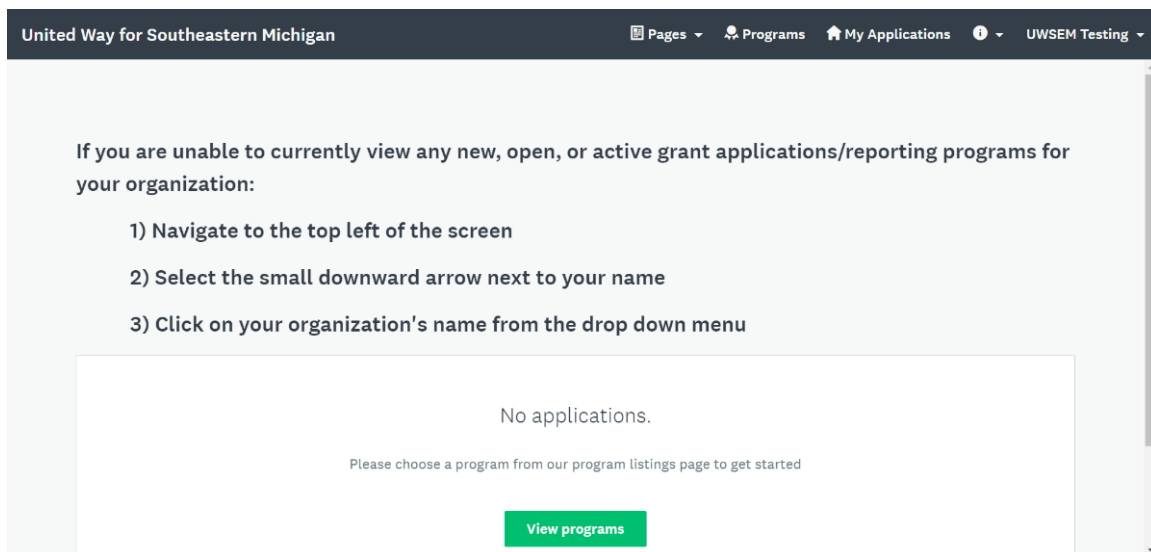
Adding Individuals to Your Organizational Account Via My Settings

If you log into your SMA Account and are unable to see a name in the top left corner (beneath the United Way for Southeastern Michigan header), you are not connected to an organizational account. See the below photo for reference.

1. To set up your organization, navigate to your name (top RIGHT corner) and click. A drop box will appear – select **My Account**.
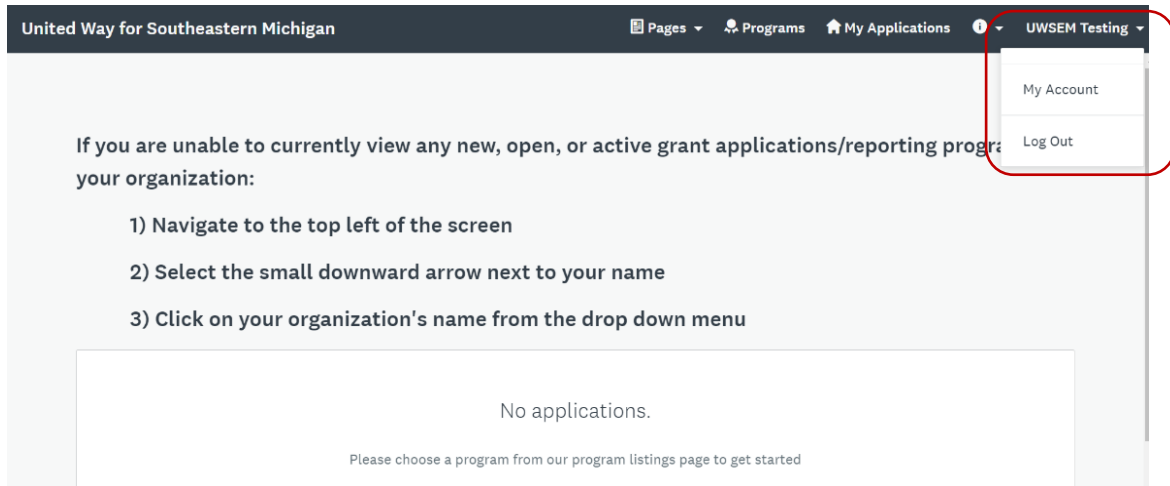
2. A new page will open with your individual settings. Scroll to the **Set Up Organization** button and click the grey button.
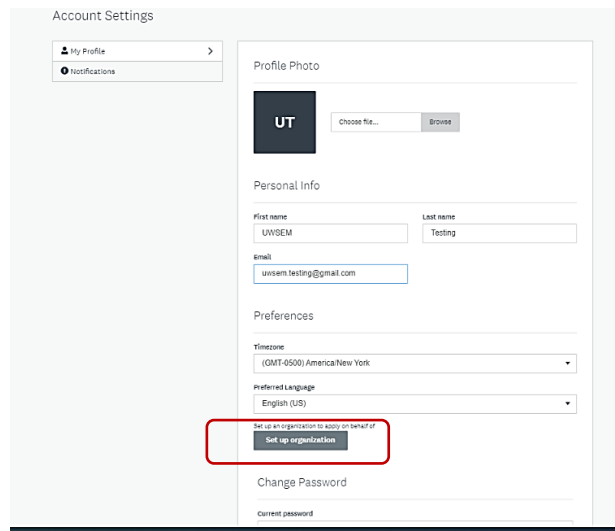
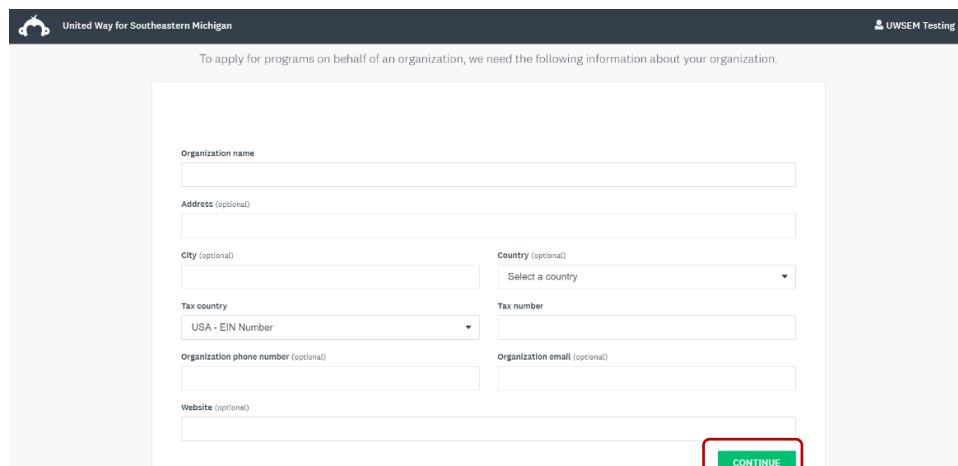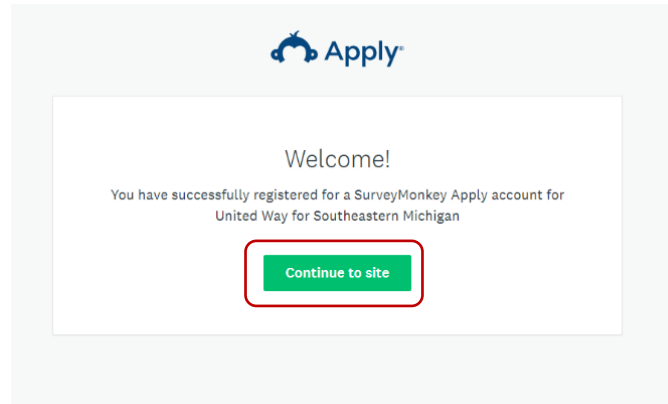3. A new page will open, you will need to complete at minimum the Organization Name and Tax Number. Once complete, selected the green **Continue** button.

4. A new page will open confirming your organization's registration. Select the green, **Continue to Site** button.


5. Now when you are on your homepage, you should see your information in the top RIGHT corner. Select the downward arrow to open the drop box. To access any open/active grant applications select the downward arrow your organization next to the small building icon in the drop box.
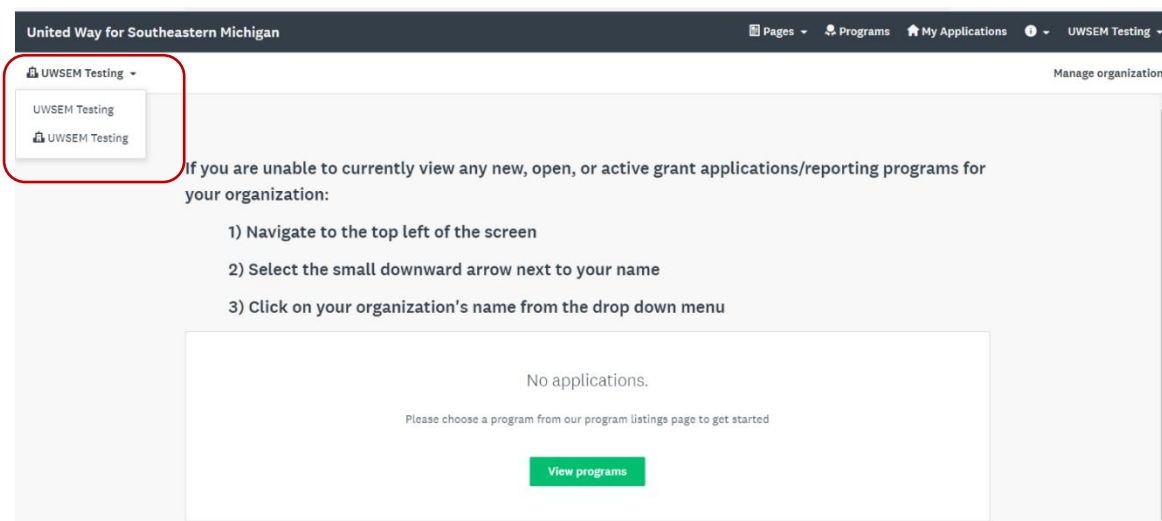
Technical Assistance

If you have any additional questions or user experience issues, you can request technical assistance or help in a variety of ways.

1. You can select the "i" icon, located on the right side of the header. This will produce a drop-down box with the following options.
   a. Questions about a program or information on this site? Contact the site administrator.
      i. This generates an email straight the UWSEM site administrator.
   b. Need help with using SurveyMonkey Apply? Check out the FAQ.
      i. This takes you the SMA help site.
   c. Having technical issues with this site? Fill in a support request form.
      i. This will generate a ticket that goes straight to the Survey Monkey Apply developer to assist in addressing the concern.
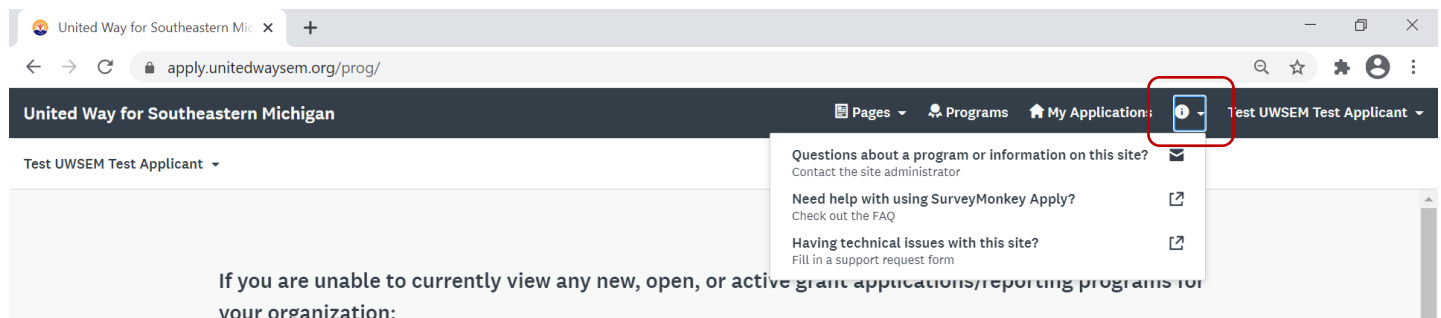
2. Users can also email the UWSEM site administrative inbox directly at SMA@unitedwaysem.org
   a. Typical response time is about 24 business hours.