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
 - o 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 <u>sma@unitedwaysem.org</u> to avoid creating a duplicate profile.

1. Visit the Survey Monkey Apply website: <u>https://apply.unitedwaysem.org/</u>

Select the green, **Register** button.

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	United Way for Southeastern Michigan				
	We Live United for universal success and prosperity in Southeastern Michigan.				
	United Way works to create measurable, sustainable change in Southeastern Michigan. To do this, we invest in and collaborate with local organizations that effectively create opportunities and contribute toward our vision of creating stable households and ensuring children can thrive.				
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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**.

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	OR	
 Register as an indivi Register as an organ 		
First name	Last name	
Email		
Password		
		0
Confirm password		
		0
By registering for an account,	you agree to our <u>terms of service</u> .	and privacy policy.
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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**.

Organization name	
Address (optional)	
City (optional)	Country (optional)
	Select a country -
Tax country	Tax number
USA - EIN Number	•
Organization phone number (optional)	Organization email (optional)
Website (optional)	

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



Welcome!
ly registered for a SurveyMonkey Apply account for ted Way for Southeastern Michigan
n link to your email. You won't be able to submit application ain tasks until your email address has been verified.
Continue to site

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

Select Send Verification Link.

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	Vour email address has not been verified! To will not be able to submit applications or complete certain tasks until you have verified your email address If you are unable to currently view any new, open, or active grant applicat your organization: 1) Navigate to the top left of the screen 2) Select the small downward arrow next to your name 3) Click on your organization's name from the drop down menu No applications. Please choose a program from our program listings page to get starters View programs	ions/report	Send verification						
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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.

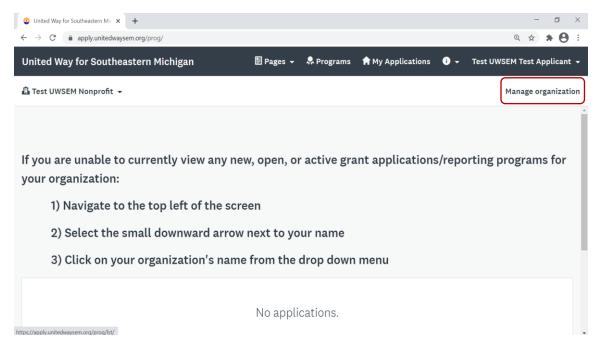
Dear UWSEM Test Organization Test 2,	
In order to validate your SurveyMonkey Apply account we require you to verify your email address. Please click the link below to help us validate that it's really you and your account should be ready to go.	🔥 Apply
Thanks, The SurveyMonkey Apply Team	Thanks!
Confirm email address If the button is not clickable, please copy and paste this URL into your browser's address bar: https://aeeix.unitedevavsem.org/acc/er/3bb66625-b24f-tw92.http://tee66124942ar/	Your email address is now verified.

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.

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	Name	Email	Role	Teams	Last login Sig	nup date Act	tive
	TT Test UWSEM To	est Applicant uwsemtestnonprofit@gmail.co	m Primary adminis	rator	Today Fel	o 25 2021 🗸	
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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.

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Test UWSEM Nonprofit	Add members	Import members	X Manage organization
o	First name	Last name	
	Role: Non-administrator Organization administrator Add to team Notify member by email that they have been added		
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4. If an individual is successfully added they will now appear under the organization's member tab.

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	Name	Email	Role	Teams	Last login	Signup date	Active	
	RS Recovery SMA	recoverysma@gmail.com	Administrator		Invited: 3 days ago	Today	~	
	TT Test UWSEM Test Applicant	uwsemtestnonprofit@gmail.com	Primary administrator		Today	Feb 25 2021	*	
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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.

United Way for Southeastern Michigan
Dear Recovery SMA,
You have been invited to be an Applicant for the following site, United Way for Southeastern Michigan . Please click on the following link to complete the registration process.
Thank you,
United Way for Southeastern Michigan
Join now

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.

with your account and we will send
RUCTIONS





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

United Way for Southeastern Michigan
Dear Jane Smith,
Someone requested to reset your SurveyMonkey Apply password. If this was not you, you can safely ignore this email.
Thanks, The SurveyMonkey Apply Team
Reset password
If the button is not clickable, please copy and paste this URL into your browser's address bar: https://septy.unitedwavaem.org/acc/p/122502461-53311f999ecb3763becc87c5963fe600/
You are receiving this email from <u>United Way for Southeastern Michigan</u> - United Way for Southeastern Michigan. <u>Unsubscribe</u> <u>Terma</u> <u>Privacy</u>
Apply.

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.

📥 Apply	
Password reset	
Please enter your new password below.	
Password	
	۲
Confirm Password	
	۲
Reset 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.



United Way for Southeastern Michigan	
Dear Jane Smith,	
This is confirmation that your SurveyMonkey Apply account password has been updated.	Vour password has been reset.
If you did not request this change and believe your account has been compromised, please contact SurveyMonkey Apply support by clicking this link: <u>https://smapply.zendesk.com/hc/en-</u>	If you are unable to currently view any new, open, or active grant applications/reporting programs fo your organization:
us/sections/115000411593-Contact-Us	1) Navigate to the top left of the screen
Thank you, The SurveyMonkey Apply Team	2) Select the small downward arrow next to your name
пе за чеумонкеу другтеан	3) Click on your organization's name from the drop down menu
You are receiving this email from United Way for Southeastern Michigan - United Way for	No applications.
Southeastern Michigan. <u>Unsubscribe i Terma</u> i <u>Privaq</u> y	Please choose a program from our program listings page to get started
	View programs

Starting Your Organization & Financial Profile

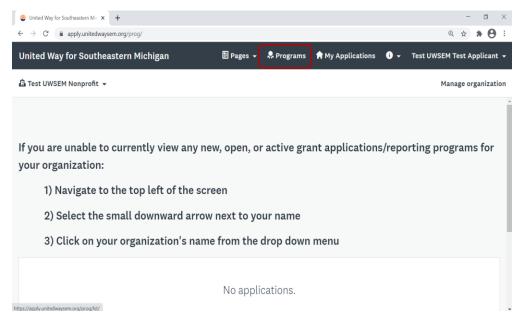
These instructions are specific to organizations that have not completed an Organizational & Financial Profile in the past.

**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.



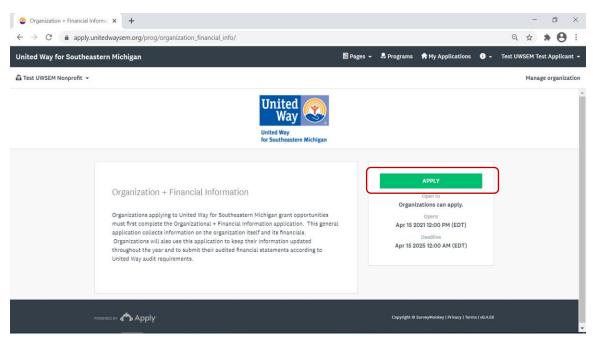
If this is your first time in SMA, or you have yet to complete the Organization & Financial Profile – you will select the green, **More** button. This is also where you will be able to access your identified grant application.

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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 United Way for Southeastern Mi⊂ × + ٥ $\leftarrow \rightarrow C$ \hat{e} apply.unitedwaysem.org/prog, Ð, ☆ * **e** : 🗄 Pages 👻 United Way for Southeastern Michigan 💂 Programs 🔒 My Applications i) -Test UWSEM Test Applicant 🗓 Test UWSEM Nonprofit 👻 Manage organization Test UWSEM Test Applicant 🖪 Test UWSEM Nonprofit If you are unable to currently view any new, open, or active grant applications/reporting programs for your organization: 1) Navigate to the top left of the screen 2) Select the small downward arrow next to your name 3) Click on your organization's name from the drop down menu No applications.

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

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	1) Navigate to the top left	of the screen								II.
	2) Select the small downw	ard arrow next to your name								I
	3) Click on your organizat	ion's name from the drop down menu								I
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	Organization + Financial Information 1678836890 Test UWSEN Nonprofit Deadline: Apr 15 2025 12:00 AM (EDT)									
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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)



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Deadline: Apr 15 2025 12:00 AM (EDT)	four tasks		
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uwsemtestnonprofit@g View & edit	() El 2020 Audit Optoad (optional)		

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.

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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.

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🛕 Test UWSEM Nonprofit 👻		Manage organization
< Back to application	Completed Apr 22 2021 06:18 PM (EDT)	
Organization + Financial Information 1678836890 1 10: 1678836890	Instructions First-time applicants If this is your first time applying to a United Way grant opportunity through Survey Monkey Apply.	
C 🗈 Instructions >	1. Fill in information about your organization in the Organizational Profile task and click "Mark as Complete" at the end.	
Org/Fin: Organization	 Upload your most recent audited financials using the appropriate task based on the fiscal year-end of your most recent audited financials. Use the left-hand navigation bar to move between tasks and select the correct task for uploading your financials. 	
() D19 Audit Upload (optional)	3. Click "Submit" on the left hand navigation bar.	
() B 2020 Audit Upload (optional)	Returning applicants If you have previously applied to a United Way grant opportunity through Survey Monkey Apply:	
1 of 2 required tasks complete	 Review your previous responses for accuracy. The Organizational Profile task has been pre-filled for you. If you need to make updates to your information, click the ellipsis icon and choose "Edit", make updates as necessary, and click "Mark as Complete" at the end of the task. If you do not need to make any updates, use the left-hand navigation bar to move on to the next task. 	
REVIEW SUBMIT	2. If you have new euclted financials since the last time you applied for a grant, upload your new audited financials. Use the left-hand navigation bar to select the appropriate task to upload your most recent financials based on the fiscal year-end of your most recent audited financial statements.	
	3. Click "Submit" on the left hand navination har	•

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.



	Sack to application					
Organization + Financial Information 1678836890						
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	1 of 2 required tasks complete					
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REV	VIEW SUBMIT					

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.

7943615735 ID: 7943615735	Submit application
Instructions	
Org/Fin: Organization Profile	
() a 2019 Audit Upload (optional)	Please confirm submission of your application.
Optional)	If you wish to take a look at the application before submitting, please Review it.
2 of 2 required tasks complete	
Last edited: Apr 23 2021 11:35 AM (EDT)	
Deadline: Apr 15 2025 12:00 AM (EDT)	CANCEL REVIEW SUBMIT

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.



0				
Application Submitted!				
Thank you for submitting your application.				
Go to My Applications				
View more Programs				
All Applications -				
Organization + Financial Information 7943615735 UWSEM Test Organization 2 Deadline: Apr 15 2025 12:00 AM (EDT)				
VIEW Submitted on: Apr 23 2021 12:36 PM (EDT)				

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.

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	If you are unable to currently view any new, open, or active your organization:	grant	applicatio	ns/reporting pr	ogran	ns for
	1) Navigate to the top left of the screen					
	2) Select the small downward arrow next to your nam	e				
	3) Click on your organization's name from the drop do	own me	enu			
	No applications.					
	Please choose a program from our program listi	ings page i	to get started			
	View programs					

1. To set up your organization, navigate to your name (top RIGHT corner) and click. A drop box will appear – select **My Account**.



United Way for Southeastern Michigan	🗄 Pages 👻	🐥 Programs	Applications	0 -	UWSEM Testing 👻
					My Account
If you are unable to currently view any new, open, or your organization:	active grant	applicatio	ns/reporting pr	ogra	Log Out
1) Navigate to the top left of the screen					
2) Select the small downward arrow next to you	ır name				
3) Click on your organization's name from the d	rop down m	enu			
No applica	ations.				
Please choose a program from our pro	gram listings page	to get started			

2. A new page will open with your individual settings. Scroll to the **Set Up Organization** button and click the grey button.

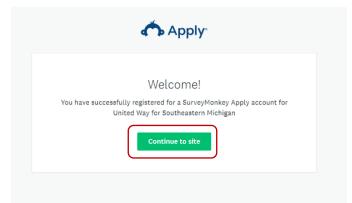
A My Profile	> Profile Photo		
Notifications			
	UT	Choose file Browse	
	Personal Info		
	First name	Last name	
	UWSEM	Testing	
	Email		
	uwsem.testing@gma	ail.com	
	Preferences		
	Timezone		
	(GMT-0500) America	iNew York	-
	Preferred Language		
	English (US)		•
	Set up an organization to acr Set up organization		
	Change Passwo	ord	

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.

¢	United Way for Sout	heastern Michigan		💄 UWSEM Testing 👻
		ization, we need the following information about your organization.		
		Organization name Address (updonal) City (updonal)	Country (optional)	
			Select a country 💌	
		Tax country	Tax number	
		USA - EIN Number	•	
		Organization phone number (optional)	Organization email (optional)	
		Website (optional)		
			CONTINUE	

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.

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		3)	Click on you	ur organiz	ation s nar		ne drop down	i menu						
				Pl	ease choose a p	program from ou	ur program listings p	bage to get st	arted					
						View	programs							



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.

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	Need help with using SurveyMonkey Apply? Check out the FAQ	2
	Having technical issues with this site? Fill in a support request form	12
If you are unable to currently view any new, open, or acti	ve grant applications/reporting program	15 101
vour organization:		

- 2. Users can also email the UWSEM site administrative inbox directly at <u>SMA@unitedwaysem.org</u>
 - a. Typical response time is about 24 business hours.