# **Survey Monkey Apply Manual**



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: <u>https://apply.unitedwaysem.org/</u>

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 Open Grant & Funding Opportunities
- 6. Locating Your Open Applications & Reports
- 7. Navigating Your Application
- 8. Creating an Organizational Account via My Setting
- 9. 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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	Log In	Register	0 -
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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**.

	Register with
f	<b>y</b> G
	OR
Register as an indivi	
Register as an organ	nization
First name	Last name
Email	
Password	
Confirm password	
By registering for an account,	you agree to our terms of service and privacy policy.
l'm not a robot	reCAPTCHA Printsy - Terms

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!
ully registered for a SurveyMonkey Apply account for nited Way for Southeastern Michigan
ion link to your email. You won't be able to submit applications ertain 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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	Your email address has not been verified! You will not be able to submit applications or complete certain tasks until you have verified your email address of you are unable to currently view any new, open, or active grant application 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 started View programe	ions/report	ing progr						•
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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.

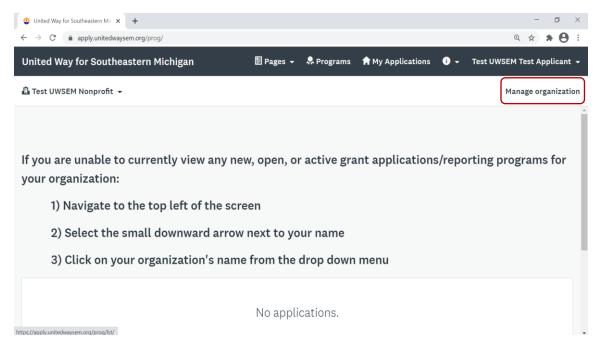
Dear UWSEM Test Organization Test 2,	
In order to validate your SurveyMonkey Apply account we require you to verify your email address. Please click the link below to help us validate that it's really you and your account should be ready to go.	🔥 Apply
Thanks, The SurveyMonkey Apply Team	Thanks!
Confirm 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 (1<sup>st</sup> 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		X Import members	Manage organization
	First name	Last name		
0	Email: (required)			
	Role: Organization 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	~	
		Page: 1 (1 - 2	of 2) 25 🔹 🗭					
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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, <b>United Way for Southeastern Michigan</b> . 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.

Fo	rgot your password?
	dress associated with your account and we will send
you instructions.	
Email	
	SEND INSTRUCTIONS





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://wepty.unitedwavaem.org/acc/p/122562461-533119999cob3763beccd77c99b3fe600/
You are receiving this email from <u>United Way for Southeastern Michigan</u> - United Way for Southeastern Michigan. <u>Unsubscribe</u>   <u>Terms</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.

n 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.



Dear Jane Smith,	
This is confirmation that your SurveyMonkey Apply account bassword has been updated.	Your password has been reset.
f 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 f your organization:
is/sections/115000411593-Contact-Us	1) Navigate to the top left of the screen
Fhank you,	2) Select the small downward arrow next to your name
The SurveyMonkey Apply Team	3) Click on your organization's name from the drop down menu
You are receiving this email from <u>United Way for Southeastern Michigan</u> - United Way for	No applications.
Southeastern Michigan. Unsubscribe   <u>Terms</u>   <u>Privacy</u>	Please choose a program from our program listings page to get started
powered by	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, make sure to switch to your Organizational View.

To do so, locate your **name** in the top left corner. Select the small downward arrow, then select your organization out of the drop box.

United Way for Southeastern Michigan		🗄 Pages 👻	💂 Programs	A My Applications	0 -	Jane Smith 👻
Jane Smith 👻						
Jane Smith						
🔒 Sample Organization						
	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.					
	Please choose a program from our program listings page to get started					
	View programs					

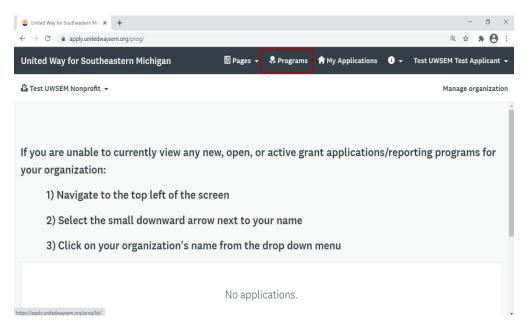
2. A new page will load, which looks nearly identical to your initial home screen but now you will see your organization's name in the top left corner.



see your org	anization's name in the top left corner.			for Southeas	stern Mic	hi
United Way for Southeastern Michigan		🗄 Pages 👻	🐥 Programs	Applications	🛈 🗕 Jar	e S
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	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.					
	Please choose a program from our program listings page to get started					
	View programs					

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

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4. By selecting Programs, it will take you to the page with all of our current open RFP funding opportunities.

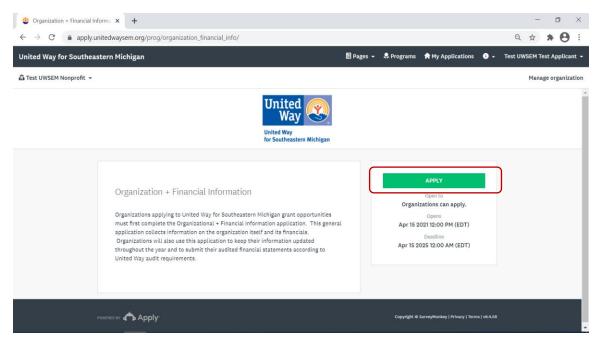
If this is your first time in SMA, or you have yet to complete the Organization & Financial Profile – you will select the green, **More** button. This is also where you will be able to access your identified grant application.

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	Programs	Search programs. Q		
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	Educational Wraparound Services 2021-2 Anonemic application from the size state of Hittories in size and the size align grant of the size of the si			

5. 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 Open Grant & Funding Opportunities



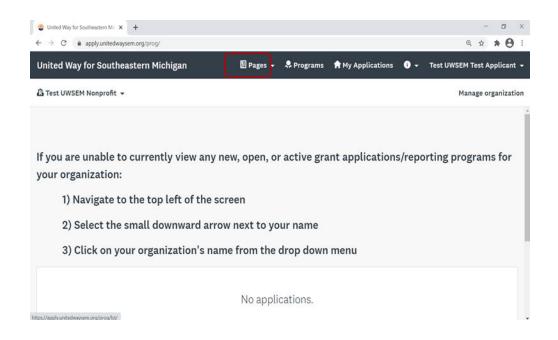
This section will provide a guide on how to locating any active, open grant or funding opportunities for Southeastern Michigan. The steps below are very similar in the process of starting your Organizational and Financial Information program, which is a requirement of all UWSEM grants.

1. After logging into your SMA account, make sure to switch to your Organizational View.

To do so, locate your name in the top left corner. Select the small downward arrow, then select your organization out of the drop box.

Pages -	R Programs	Applications	0 -	Jane Smith +
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2. After logging into your SMA account, locate the **Programs** tab on the header.





 By selecting Programs, it will take you to the page with all of our current open RFP funding opportunities. This page houses an overview to the funding opportunities, application open dates, and applicant category (individual vs. organizations).

Note: While there are a few exceptions, most of United Way for Southeastern Michigan's funding opportunities are reserved for organizations.

Programs	Search programs. Q
Economic Mobility Microgrants	Organization + Financial Information
Accepting applications from Sep 2 2021 12:00 AM (EDT) to Sep 6 2021 12:00 PM (EDT)	The first step to applying to a United Way grant opportunity: organizational overview and audited financial statements
This program provides small cash grants to enable individuals and families to take advantage of economic-mobility-enhancing	
opportunities when they arise. Applicants must be working with a financial coach through the Centers for Working Families program.	Organizations can apply.
Individual applicants can apply.	MORE >
MORE >	
2021 COVID-19 Vaccine Outreach, Educati	
Accepting applications from Sep 6 2021 08:00 AM (EDT) to Sep 20 2021 05:00 PM (EDT)	
United Way for Southeastern Michigan - 2021 COVID-19 Vaccine Outreach, Education, and Mobilization Request for Proposals	
organizations can apply. \$5,000.00 to \$20,000.00	

- 4. Select the green More on desired program for further details and to access the associated application.
- 5. A new page will open and should the application be available to applicants, a green **Apply** button will be available. If the application has yet to be released, you will be able to view all the associated details but will need to return to SMA following the application opening to select Apply.

United Way United Way for Southeastern Michigan	
Organization + Financial Information Organizations applying to United Way for Southeastern Michigan grant opportunities must first complete the Organizational + Financial Information application. This general application collects information on the organization itself and its financials. Organizations will also use this application to keep their information updated	Open to Organizations can apply. Opens Sep 1 2021 08:00 AM (EDT)
throughout the year and to submit their audited financial statements according to United Way audit requirements.	

6. After selecting Apply, the full application will open to you. Organizations can work on the application in pieces at any time prior to the close date. To do so, just log back into your SMA account – switch to the Organizational View and select continue on the open application.

## 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)

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🔓 Test UWSEM Nonprofit 👻					Manage organization
Test UWSEM Test Applicant					•
🖪 Test UWSEM Nonprofit					
If you are unable to currently view any ne	w. open. o	r active gra	nt application	s/repo	orting programs for
your organization:	n, open, o	active gra	approacion.	5/1CPC	
your organization.					
1) Navigate to the top left of the scre	een				
2) Select the small downward arrow	next to yo	our name			
3) Click on your organization's name	e from the	drop down	menu		
	No appli	cations.			

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 l	ft of the screen									i.
	2) Select the small dow	nward arrow next to yo	our name								
	3) Click on your organi	ation's name from the	drop down menu								
	All Applications -				:	Ξ					l
	Organization + Financial Information 1678836890 Trest UWSEM Nonprofit Deadline: Apr 15 2025 12:00 AM (EDT)										
	0 of 2 required tasks complete START Last edited: Apr 22 2021 05:40 PM (EDT)										l

### 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)

Organization + Financial Informa × +		- 0 ×
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United Way for Southeastern Michigan	📓 Pages 👻 🐥 Programs  🏦 My Applications 🕚 🗸	<ul> <li>Test UWSEM Test Applicant -</li> </ul>
🔓 Test UWSEM Nonprofit 👻		Manage organization
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0 of 2 required tasks complete	Organization + Financial Informa_ [2] O Preview	
Last edited: Apr 22 2021 05:48 PM (EDT)	1678836890	
REVIEW SUBMIT	APPLICATION ACTIVITY	
Deadline: Apr 15 2025 12:00 AM (EDT)	Your tasks	
	Instructions	
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Test UWSEM Test Applic	) 🗈 2019 Audit Upload (optional)	
uwsemtestnonprofit@g View & edit	📄 🖹 2020 Audit Upload (optional) >	
Add Member or Team		

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.

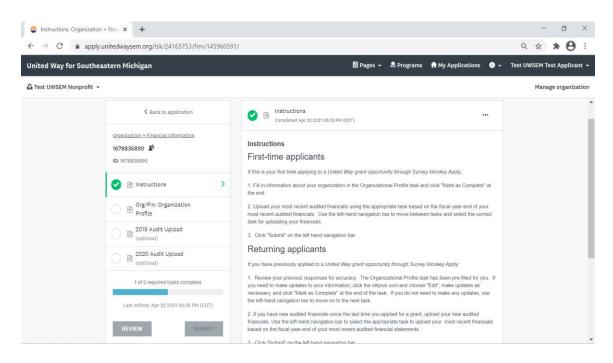
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🚨 Test UWSEM Nonprofit 🔸			Manage organizatio
	10:1078036800	Plant along and Handa	
	📄 🖻 instructions 🔷 >	First-time applicants "this is your first time applying to a United Way grant opportunity through Survey Monkey	
	Org/Fin: Organization	Apply.: 1. Fill in information about your organization in the Organizational Profile task and click "Mark as	
	O E 2019 Audit Upload	Complete <sup>®</sup> at the end. 2. Upload your most recent audited financials using the appropriate task based on the fiscal	
	D 10 2020 Audit Upload	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.	
	0 of 2 required tasks complete	Click "Submit" on the left hand navigation bar.     Returning applicants	
	Last edited; Apr 22 2001 05;48 PH (EDT)	If you have previously applied to a United Way grant opportunity through Survey Monkey	
	REVER AND A CONTRACT	Apply: 1. 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	
	Deadline: Apr 13 2023 12:00 AM (EDT)	"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 mavigation bar to move on to the next task.	
		2. If you have new audited financials since the last time you applied for a grant, upload your new audited financials. Use the left-hand navigation bar to welect the appropriate task to upload your most recent financials based on the fiscal year-end of your most recent audited financial stratements.	
		<ul> <li>3. Click "Submit" on the left hand nevigation bar.</li> </ul>	
		Note for Organizations Using Fiduciaries	
		If an organization is applying using a fiduciary, the Survey Monkey Account must be registered in the Fiduciary Organization's name.	
		1. The Organizational Profile and Audited Financial count be filled out from the Fiduciary Organization's perspective.	
		2. The Contact Information task in specific account of the will include contact information for both the fiduciary and implementing or 2.	

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.

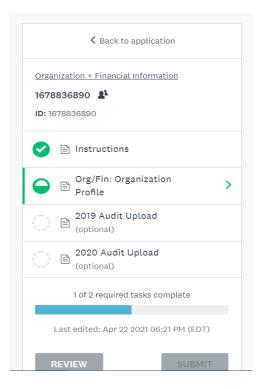


Note: To edit a previously submitted task, select the **ellipses** (...) in the top right corner of the form you would like to edit. Forms can be edited after saved but the entire application has yet to be submitted, however, if once an application is submitted it can not be edited unless reopened by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

7943615735 ID: 7943615735	Submit application
✓  ☐ Instructions	
Org/Fin: Organization Profile	
() B 2019 Audit Upload (optional)	Please confirm submission of your application.
CO20 Audit Upload	If you wish to take a look at the application before submitting, please <b>Review</b> it.
2 of 2 required tasks complete	
Last edited: Apr 23 2021 11:35 AM (EDT)	
REVIEW 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.

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

# Creating an 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.

United	ed Way for Southeastern Michigan 🗏 Pag	es 🔻	🐥 Programs	n My Applications	i) -	UWSEM Testing 👻
	If you are unable to currently view any new, open, or active g your organization:	rant	applicatio	ns/reporting p	rograi	ms for
	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 dow	n m	enu			
	No applications.					
	Please choose a program from our program listing	s page	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 ac your organization:	tive grant:	applicatio	ns/reporting pi	ogra	Log Out
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 dro	op down m	enu			
No applicati	ons.				
Please choose a program from our progra	ım 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.

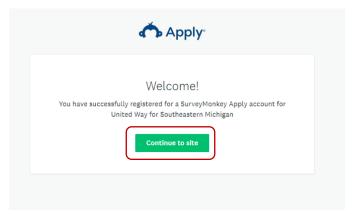


🚨 My Profile	>				
O Notifications		Profile Photo			
		UT	Choose file	Browse	
		Personal Info			
		First name		Last name	
		UWSEM		Testing	
		Email			
		uwsem.testing@gn	nail.com		
		Preferences			
		Timezone			
		(GMT-0500) Americ	ca/New York		-
		Preferred Language			
		English (US)			•
		Set up an organization to a			
	(				
		Set up organizatio	on		

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.

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	To apply for programs on behalf of an organization, w	e need the following information about your organization.	
	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)		
		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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l	UWSEM Testing If you are unable to currently view any new, open, or active grant app 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						ations/r	eporting	pro	ograms f	for											
						Please	≥ choose	e a progra	ram from	 ations. gram listir rams	ngs page to	o get sta	rted									

### 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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Test UWSEM Test Applicant 👻	Questions about a program or information on this site? Contact the site administrator	
	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.