GOAPPLY USER GUIDE

A GUIDE FOR GOAPPLY VERSION 2 USERS (APPLICANTS)

INTRODUCTION

Your Grantmaker is using a system called GOapply to accept grant applications. The following guide will take you through the process of creating an account, starting an application, and submitting an application.

First, a brief overview of how applications are set up in GOapply. When you login to GOapply, you will see a list of applications that you are eligible to apply for. Applications with multiple phases (e.g. application, final report) will be advanced by your Grantmaker. Once the next phase (such as a final report) is available to you, you will see it in your Applicant Dashboard.

Please note, the screenshots in this guide are to be used for general reference, the appearance GOapply or any related emails may be different in your experience due to formatting and branding, however the functionality remains the same.

GETTING STARTED

REGISTER

If this is your first time using GOapply, you'll need to register your account. You will have the option of registering as an individual or an organization. **Choose organization.**

AS AN ORGANIZATION

Click register a new account on the log in screen and select Organization. You will then need to choose your country and apply either with a Tax ID or through manual data entry.

We'll walk through each option below.

IN THE UNITED STATES

Choose United States as your Region.

GOapply

Search for your Organization

Choose your region: United States   Canada

Search by Charity Employer Identification Number (EIN)

Every charity has its own unique federal employer identification number (EIN), which it obtains by applying to the IRS. An EIN is typically a nine-digit number, shown like 12-3456789. A few charities have EINs with eight or fewer digits (normally shown with a leading zero like 01-2345678).

US IRS Tax Exempt Organization Search Tool

EIN / Tax ID

Skip, manually enter   Search

WITH TAX ID

Enter your Tax ID then Search. If you don't know your Tax ID, click on the US IRS Tax Exempt Organization Search Tool to find it. After inputting your Tax ID, GOapply will search for your organization then ask you to confirm that it is correct on the next screen. If your organization is correctly displayed, click Select. Or you could Search Again or click Skip, manually enter.

You'll then be taken to your Organization Profile. Your organization's information will autofill, but you'll need to enter your contact information. The email address you enter will be what you use to log in. Click Register.

From there, you will be able to login using your email and password.

MANUAL ENTRY

If you choose to register manually, you'll be taken directly to your organization profile. Fill in the form with your organization's information and your contact information. The email address you enter will be what you use to log in. Click Register. From there, you will be able to login using your email and password.

PASSWORD ASSISTANCE

If you forgot your password, click Forgot Password from the log in screen and follow the steps to reset.

You can also reset your password at any time by clicking on the dropdown next to your name in the top right and going to User Settings.

DASHBOARDS

Once you are registered and logged into GOapply, you'll see Submissions, Opportunities, and Organizational Profile.
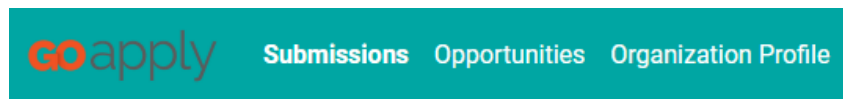
Submissions: The Submissions dashboard shows which applications you have in progress and allows you to view your submitted applications.

- **In Progress**: Click In Progress to continue working on the application

- **Submitted**: Click View to view your submitted application or download the submitted application in PDF by clicking the download button all the way to the right.

Opportunities: The Opportunities Dashboard shows which applications are available to you. Click View to see details about the application. Click Apply to start working on the first phase.

Organization Profile: for Organization users (if you registered as an organization), this is where you can view or edit information about your organization.

Messages: If your Grantmaker sends you a message through GOapply, a red number will appear in the message bubble in the top right corner of the screen. Click there to view your messages.

COMPLETING APPLICATIONS

Starting an application: To begin, choose an application from your Opportunities dashboard. Click View, then Apply from the application home page.

The application homepage is where you can find the due date, a summary and a brief description, and the contact for that application. If you need assistance with the application, please reach out to the application contact.

Upon clicking Apply, you will be asked to confirm that your Organization Profile information is correct. A pop-up window will ask you to verify or edit if needed. If anything is missing or inaccurate, click I Need To Fix, edit information, and click Submit Changes. After your changes are saved, click Back To Application to continue the application.

On each page, you can either save a draft or continue without saving. Drafts will appear in your In-Progress dashboard. When you're finished, click Submit.

If you access an application from your Opportunities dashboard and see the below message, it means you either already submitted or have a draft submission of the application that you can finish from your In-Progress dashboard.

Advancing to the next phase (such as a grant final report): When the next phase is available, it will appear in your In-Progress dashboard. If you'd like to reference information you submitted in the previous phase, look in Submissions. You'll complete each phase as it becomes available, with the option to save a draft on each page. For example, if you apply for a grant through GoApply, and receive a grant award, after that point you will see a new phase in your dashboard for the final report phase, with a due date one year from your award.

Submitting: You can view all your submitted phases in your Submissions dashboard. Changes to an application cannot be made after submitting.

If you have any questions, please contact your Grantmaker.