

# GOapply User Guide

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A GUIDE FOR ORGANIZATIONS

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## INTRODUCTION

Erie Community Foundation 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 log in to GOapply, you will see a list of applications that you are eligible to apply for. Applications with multiple phases will be advanced by your Grantmaker. Once the next phase 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

You will need to create your account.

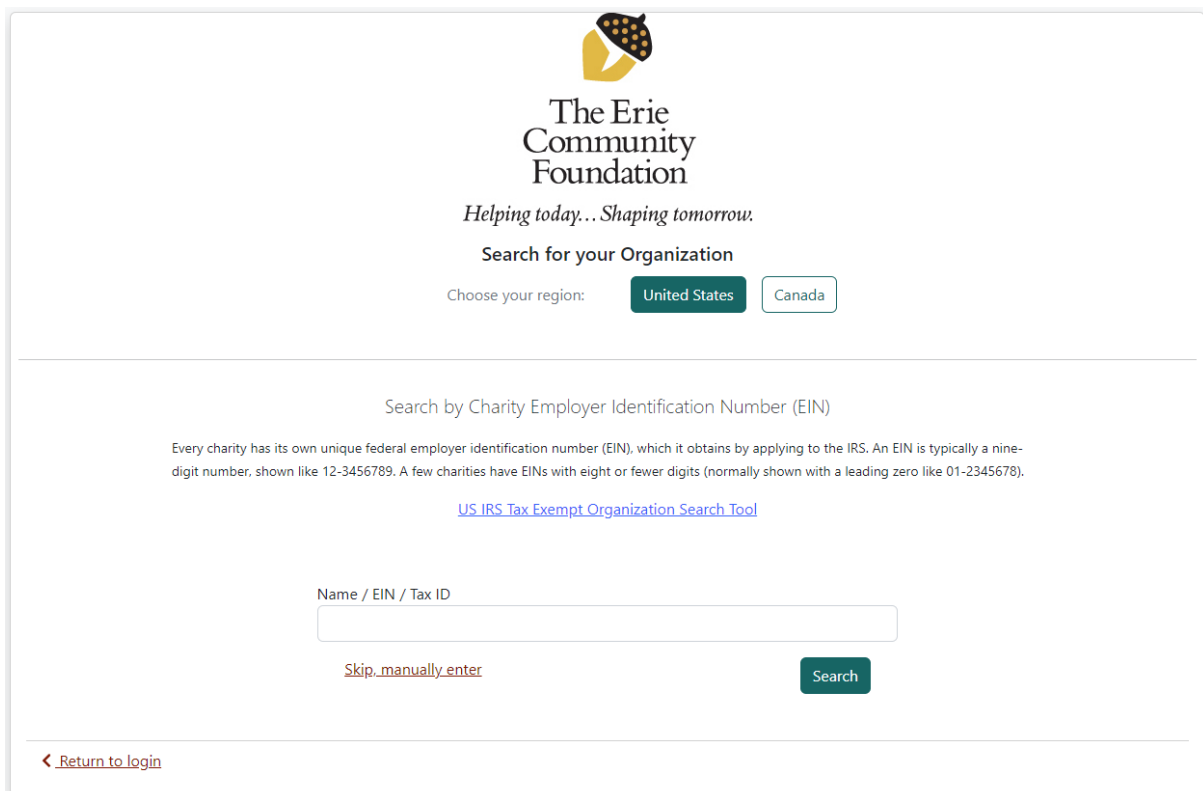
## REGISTER

If this is your first time using GOapply, you'll need to register your account.

## 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 Business Number or through manual data entry.

We'll walk through each option below.

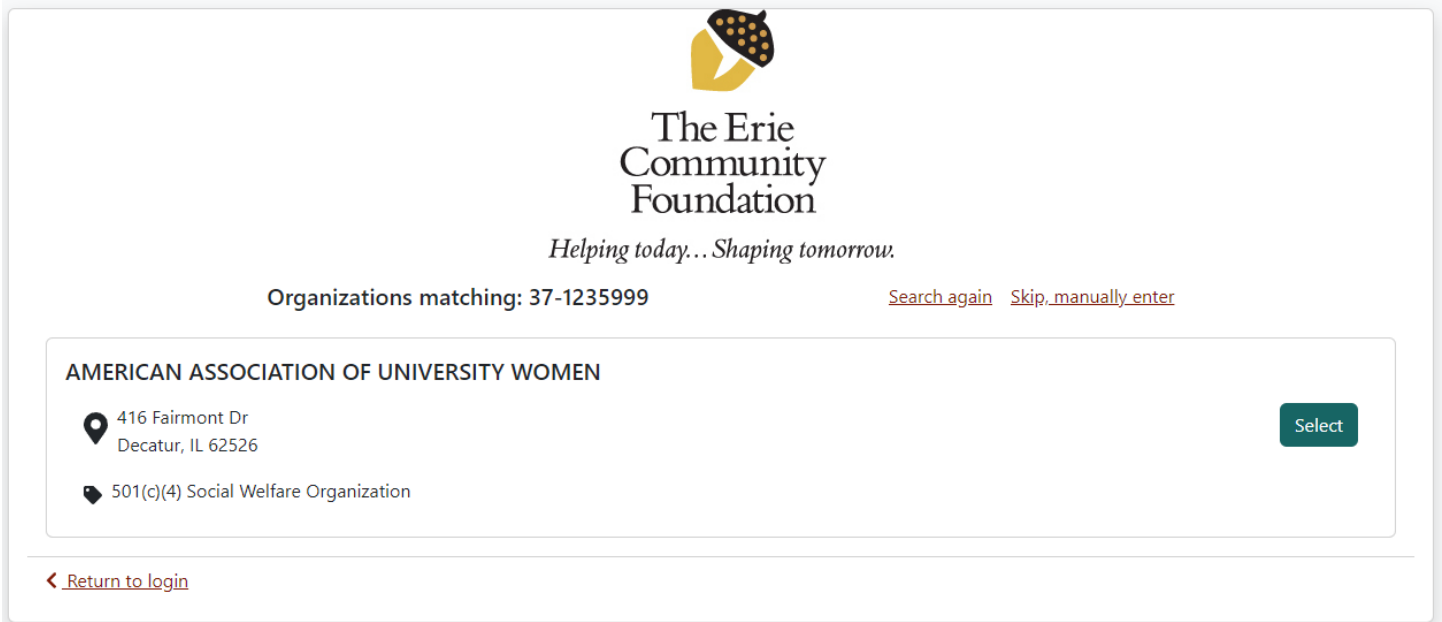


The screenshot shows the registration page for The Erie Community Foundation. At the top is the logo, which consists of a stylized yellow and black shape above the text "The Erie Community Foundation". Below the logo is the tagline "Helping today... Shaping tomorrow." and the heading "Search for your Organization". There are two buttons for "Choose your region": "United States" (highlighted in dark teal) and "Canada" (white with a grey border). Below this is a section titled "Search by Charity Employer Identification Number (EIN)". It includes a paragraph explaining that every charity has a unique federal EIN, typically a nine-digit number, and provides a link to the "US IRS Tax Exempt Organization Search Tool". At the bottom of this section is a text input field labeled "Name / EIN / Tax ID" and a "Search" button. A link "Skip manually enter" is positioned below the input field. At the very bottom left of the page is a link "Return to login" with a left-pointing arrow.

## WITH TAX ID

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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". You may also choose to "Search again" or click "Skip, manually enter".



The screenshot shows the search results for The Erie Community Foundation. At the top is the logo, which is a yellow and black stylized leaf or drop shape. Below the logo is the text "The Erie Community Foundation" and the tagline "Helping today... Shaping tomorrow." Below this, it says "Organizations matching: 37-1235999" and provides two links: "Search again" and "Skip, manually enter". A search result is displayed in a white box with a light gray border. The result is for "AMERICAN ASSOCIATION OF UNIVERSITY WOMEN". It includes a location pin icon followed by the address "416 Fairmont Dr, Decatur, IL 62526" and a document icon followed by "501(c)(4) Social Welfare Organization". A green "Select" button is located to the right of the result. At the bottom left of the search results area, there is a link "Return to login" with a left-pointing arrow.

Once you have chosen your organization, you'll 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. Once finished, click, "Register".

You will be notified via email when you have access to GOapply.

## MANUAL ENTRY

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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. Once finished, click, "Register".

You will be notified via email when you have access to GOapply.

## 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 approved and logged in to GOapply, you will see 3 page headings: "In Progress", "Submitted" and "Opportunities". Organizational applicants will see a fourth page heading for their "Organizational Profile".



**In Progress:** The “In Progress” dashboard shows which applications you have in progress. Click “View” to continue working on the application.

	Phase Due Date	Opportunity Name	Phase Name	Progress (%)	
<a href="#">VIEW</a>	1/26/2024 11:59 PM	2024 Helping Today - Cycle 1	Application	3	

**Submitted:** The “Submitted” dashboard allows you to view your submitted applications. 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.

	Opportunity Name	Most Recent Submit Date	Phase Name	Request	Request Status	Grant Amount	Decision/Board Date	
<a href="#">VIEW</a>	2024 Helping Today - Cycle 1	1/16/2024 8:39 AM	Application	20232669	Pending			

**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 the message bubble 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.

### Confirm your organization information

Is this correct?

**A Better Way Services Inc.**  
Tax ID : 35-0868081

2669 Pheasant Run  
Decatur, IL 62521

[REDACTED]

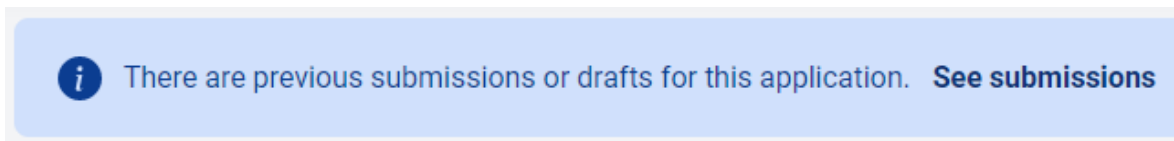
6127676710

[EVERYTHING LOOKS FINE](#) [I NEED TO FIX](#)

[SUBMIT CHANGES](#) [BACK TO 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 with the phase, 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:** 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 "Submitted". You'll complete each phase as it becomes available, with the option to save a draft on each page.

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