

## **UWSEM SurveyMonkey Apply New User Guide**

Welcome to United Way for Southeastern Michigan's new grant management system powered by SurveyMonkey Apply!

One of the key benefits of our new system is the comprehensive set of resources available to users. SurveyMonkey Apply (SMA) provides a set of in-depth Frequently Asked Questions (FAQ) guides that walk users through various topics and provides step by step instructions for managing the organization's account and completing an application.

The team at United Way for Southeastern Michigan (UWSEM) is also committed to ensuring this transition is as seamless as possible. UWSEM has put together this new user guide to streamline some of the information to help you get started in the new system. In this document, you will find information on the following topics.

Click on Underlined headings to navigate within this document to the relevant section.

### Get Started

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## Get Started

**Website** - To access and apply for UWSEM funding opportunities use this link:

<https://apply.unitedwaysem.org>

### **System Language** – Common Roles and Definitions

Before utilizing the FAQ guides, it may be useful to review the common roles and definitions referenced throughout the material.

*Site Administrators* – United Way for Southeastern Michigan. Each funding opportunity will have assigned program staff who will be responsible to answer questions about the content of specific applications and provide technical assistance related to navigating the specifics of the application.

*System Administrators*- SurveyMonkey Apply. If you encounter technical issues with the system itself. System warnings or errors related to the platform that are not related to the content or flow of the application.

*Organization* – Applicants/agencies applying for funding. Each organization may add individual *members* to its Organization's account.

*Members* - Individuals in the system. There are 3 different types of member roles.

#### 1) *Primary Administrator*

This is the organization member that initially creates the Organization in the system 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. *NOTE: They will be the primary contact for the organization.*

2) *Administrator*

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.

3) *Non-Administrative Members*

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.

**FAQ Guides -** The FAQ guides can be accessed by clicking on the links below or by navigating within the system directly.

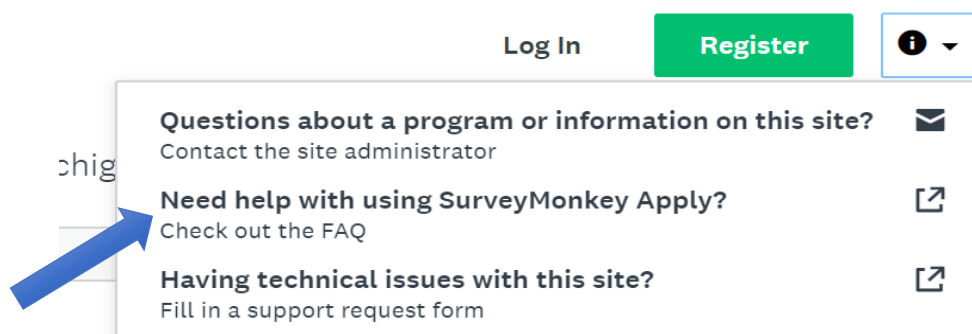
[Managing Your Organization FAQ](#)  
[Completing an Application FAQ](#)

Or

1. From the main page of the UWSEM landing page, navigating to the upper right-hand corner of the main page and looking for the information symbol:



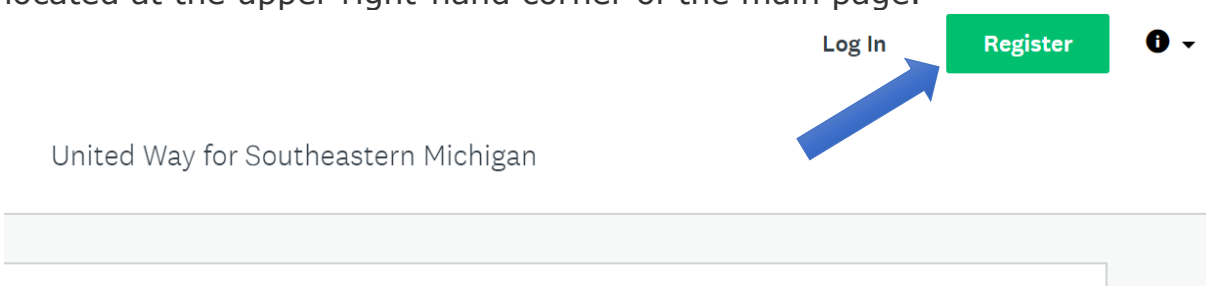
2. Click the drop-down arrow for "Need Help Using SurveyMonkey Apply?"



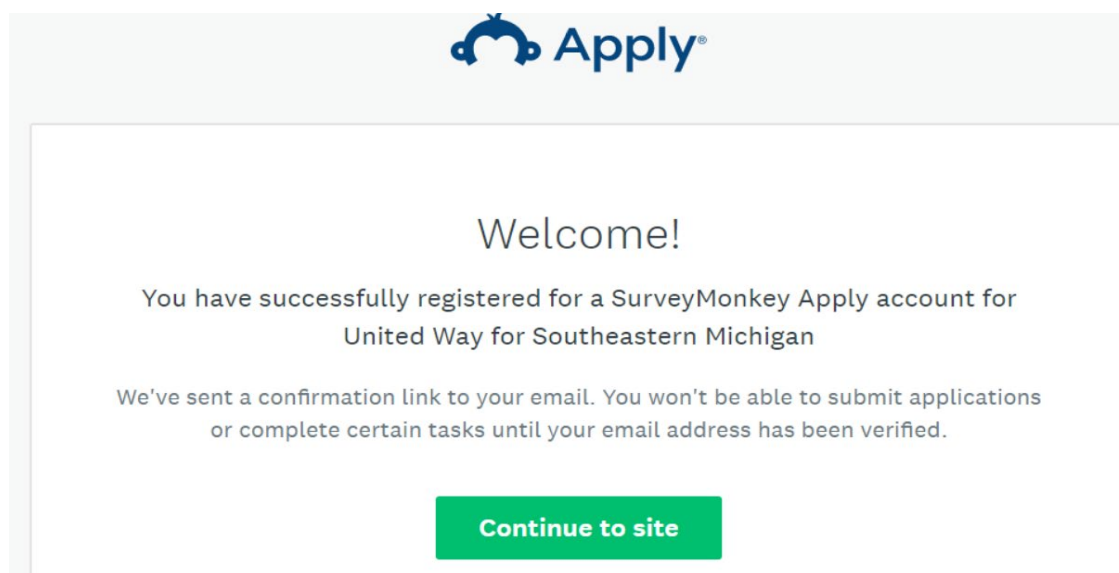
## Registering an Organization in the System

To apply for funding under one of United Way for Southeastern Michigan's programs, you must first register your Organization in the system. Identify an individual who will take on the responsibility of the Organization's [Primary Administrator](#). This is the role that should register and create the Organization's account.

1. Navigate to the UWSEM grant management system [website](#). Click **Register** located at the upper right-hand corner of the main page.



2. Choose to **Register as an Organization**
3. Complete the required information for who will be the Organization's Main Administrator, including first and last name, and email address. **NOTE:** Do NOT login with Facebook, Twitter, or Google.
4. Click **Create Account**
5. You will be asked to enter additional details about the Organization such as Organization Name, Tax Number, and optional information such as the Org. address, phone, email, and website (optional).
6. Upon successful completion of registration, this message will appear:



## Adding Members to an Organization

Once the Organization's account has been created, the [Primary Administrator](#) has full ability and [Administrators](#) have limited ability to add additional [Members](#) to assist with creating applications. Members may be added Individually or in Bulk.

### To Add Members Individually

1. Login as an organization administrator
2. Click on **Manage Organization** in the top right corner
3. Click on **Members**
4. Click on **Add Member**
5. Enter the **First Name, Last Name,** and **Email Address** of the member
6. Select if they will have Administrative or Non-Administrative Access.
7. *Optional:* If you have teams created, click to add them to a team
8. *Optional:* Notify the user that you are adding them to the organization

**TIP!** This is useful if the user does not already have an account in the system as they will receive the invite and be able to create a password to log in.

9. Click **Add**

### To Add Members in Bulk

1. Login as an organization administrator
2. Click on **Manage Organization** in the top right corner
3. Click on **Members**
4. Click on **Add Member**
5. Click on **Import Members**
6. Click to **Download Template** to populate the information for each of your members. You will require **Email, First name, Last name, Access (non-administrator, administrator)**. If you have **Teams** in the site, enter the exact name of the Team they are to be added to.
7. Once you have saved the file on your computer, select **Choose File** under **Upload your populated organization template:**
8. Choose what you would like to do with **Duplicate Entries** (refer to the available options below)
9. *Optional:* Select **Notify user by email that they have been added**
10. *Optional:* Select **Include a custom message in the email** to send a quick message including the reasoning for inviting them to the site. The same message will be sent to all users in the CSV file.

It is highly recommended that **Primary Administrators and Administrators** refer to the [Managing Your Organization FAQ](#) guide provided by SurveyMonkey Apply. It covers a wide-range of useful topics and instructions.

## Applications


There will be a couple of ways Organizations will be able to access program applications in the system.

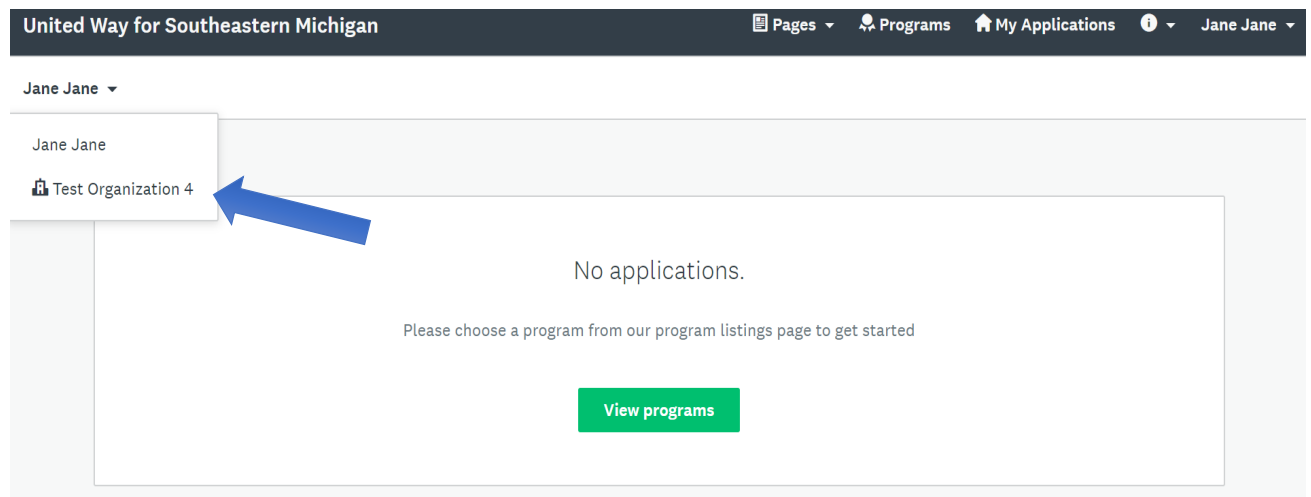
### Member/Applicant Initiated

To see programs with available funding applications and create an application.

1. Navigate to the UWSEM [website](#) and login
2. Switch from Member view to Organization view

Click on the drop down next to your name in the upper left-hand corner of the screen.

Look for the  next to the Organization Name and click to switch to the Organization view




United Way for Southeastern Michigan

Pages Programs My Applications Jane Jane

Jane Jane

Jane Jane

 Test Organization 4

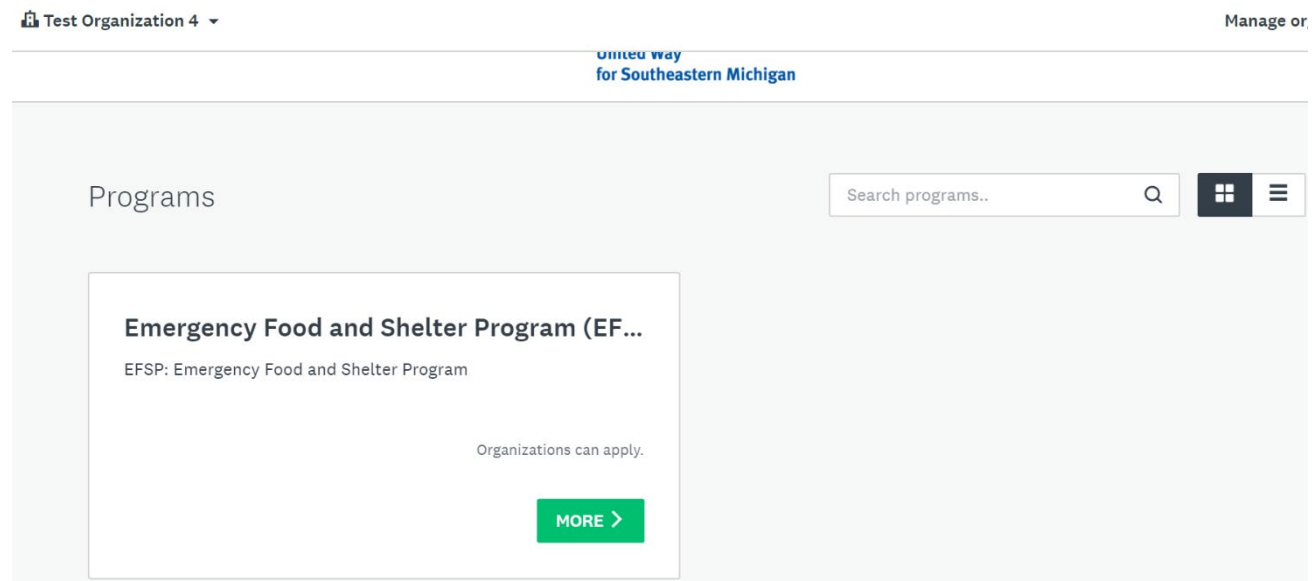
No applications.

Please choose a program from our program listings page to get started

View programs

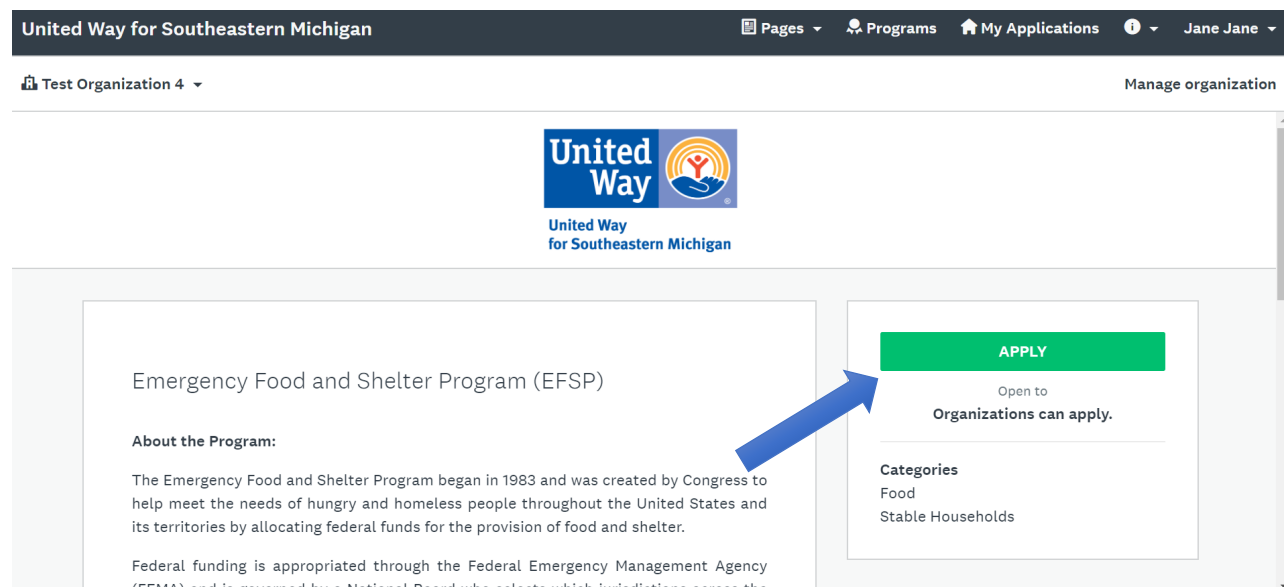
3. Click [View programs](#)

From there currently available funding opportunities will appear like this:



4. Click [MORE >](#)

You will then navigate to the program page and if applications are available, you will see [APPLY](#).



## UWSEM Created Application


There may be program funding opportunities that are invitation only, competitive processes. When this is the case, the program will **not** appear on the main page as in the example of [Member/Applicant Initiated](#) above. UWSEM program staff will create applications for Organizations invited to the opportunity. Program staff will communicate with Organizations when this is the case and notify when the application is created and available in the system.

## Access an Application

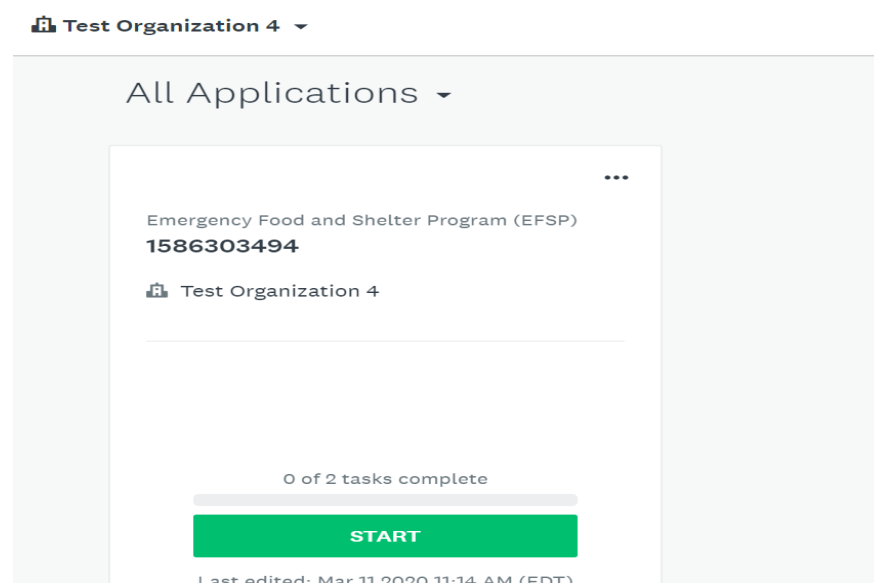
To access an application, whether it was created by the Organization or by UWSEM, follow these steps:

1. Navigate to the UWSEM [website](#) and login
2. Switch from Member view to Organization view

Click on the drop down next to your name in the upper left-hand corner of the screen.


Look for the  next to the Organization Name and click to switch to the Organization view

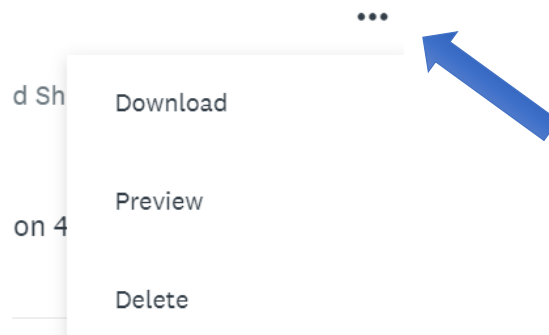
3. Once in Organization view, all created program applications will appear on your dashboard





4. To preview, download or delete an application:

Click the  to reveal more options



5. For specific application content information, refer to the designated UWSEM program staff.

### Organization Profile – First Step of the Application

Application content will be dependent on the program’s requirements, but all applications will include an Organization Profile section.

Below is additional information that will be asked in the Organization Profile when you begin the actual application. Please have these items prepared as you begin your application.









<ul style="list-style-type: none"> <li>• Website Link</li> <li>• Primary Address</li> <li>• General Information Phone Number</li> <li>• Mission Statement</li> <li>• Vision Statement</li> <li>• Description of Organization/Service</li> <li>• Identify the focus areas of the Organization</li> <li>• Indicate county or counties of Service</li> <li>• Diversity, Equity, Inclusion Policy</li> <li>• CEO and CFO contact information</li> <li>• Upload Board Roster</li> </ul>	<ul style="list-style-type: none"> <li>• Federal Tax ID</li> <li>• Upload W-9</li> <li>• Identify type of Incorporation in Michigan</li> <li>• Start and End date of the Organization’s Fiscal Year</li> <li>• Annual Audit</li> <li>• Total Operating Budget</li> <li>• Top 3 revenue sources</li> <li>• Counter terrorism Form</li> <li>• Do you engage Volunteers?</li> <li>• Are you on the UWSEM Volunteer Portal?</li> </ul>
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## Get to Know the System – Useful Info

### [SurveyMonkey Apply Icon Legend](#)

SurveyMonkey Apply uses several icons to denote different elements. Below are some common icons Organizations may see in using the platform:

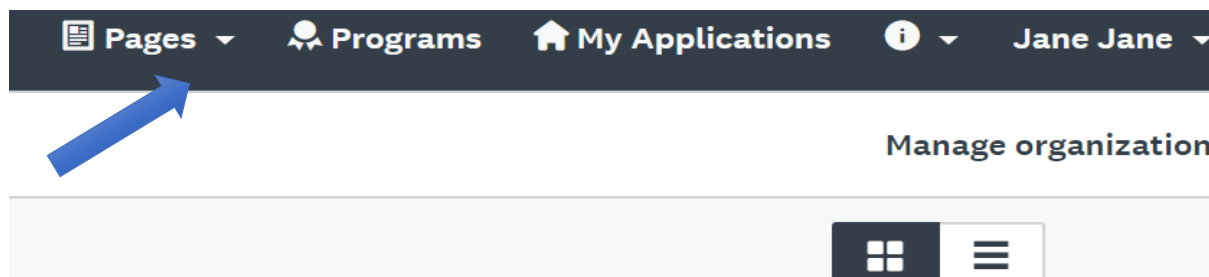
The icons within SM Apply are commonly referenced within the articles of our Help Center. This article serves as a legend of these icons to help you understand the steps to perform certain actions within your site.

<u>Icon</u>	<u>Description</u>	<u>Navigation/Function</u>
	<b>SurveyMonkey logo</b>	Returns the user to the Site Dashboard
	<b>Site Search Tool</b>	Quick search for users, applications, or reports within your site
	<b>Award Ribbon</b>	Returns the user to the Site Dashboard
	<b>Settings</b>	Select to reveal an array of pages that contribute to the layout and content of your site
	<b>More Options</b>	Select this icon to reveal more options
	<b>More Options</b>	Select this icon to reveal more options
	<b>Grid View</b>	Within the Site Dashboard, select to switch the view of your programs to grid view
	<b>List View</b>	Within the Site Dashboard, select to switch the view of your programs to list view

**Pages Section** – houses resource documents

Upon logging into your account, resource documents including this new user guide will be available under the Pages section of the menu in the upper right-hand corner of the page.

Simply click the drop-down menu to see available documents.



**Technical Assistance:**

We are confident that the new system will provide a much better user experience and appreciate your patience as we work to move into the SurveyMonkey Apply system. If you would like more information about the system, please visit their website: <https://apply.surveymonkey.com/>.

For questions about **registration, the content of an application, or if you are not sure who to contact**, please refer to the program’s designated **UWSEM** staff contacts.

For **system errors** or warnings related to the platform itself (not for issues related to inaccurate entries), **contact SurveyMonkey technical support** by navigating to the information drop down in the upper right-hand portion of the screen and completing the support request form directly to SurveyMonkey’s team.

