INTERACT FOR HEALTH — APPLICANT TUTORIAL

Create an Account/Log On

1. Click the **link** provided to you by the organization to access the Logon Page.
   If you've already created an account, enter your information and click **Log On**.

Logon

Email Address*

Password*

[Log On] [Create New Account]

Forgot your Password?

If you've already created an account but have forgotten your password, click **Forgot Your Password** to reset it.

Logon

Email Address*

Password*

[Log On] [Create New Account]

Forgot your Password?

If you haven't created an account, click **Create New Account**.

Logon

Email Address*

Password*

Log On   Create New Account

Forgot your Password?

If someone else from your organization has created an account for this site but you haven't created your own account yet, please reach out to Director of Grants Management Kristine Schultz (kschultz@interactforhealth.org or 513-458-6619). She can create an account for you that will be connected to your organization in the site. See also the section below about Adding New Users to Your Organization.

2. If you clicked Create New Account, you'll be asked to complete registration information for yourself and your organization. After filling out all the information, click **Create Account**.

Create New Account

If you already have an Account, click the 'Cancel Account Creation' button to go to the Logon page

⚠ Using the browser's back button will delete your registration information.

ⓘ This registration process has multiple steps you must complete before you can apply.

Fields with an asterisk (*) are required.

Organization Information

User Information

Executive Officer

Executive Officer Information

Password

Passwords must be at least twelve characters long and must contain at least one capital letter, one lowercase letter, one number, and one of any of the following special characters: !@#$%&*()_

Password*   **Confirm Password***

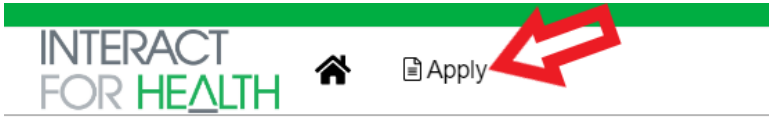‹ Previous   Create Account

3. The next page asks you to verify that you received your confirmation email. This helps ensure that you'll receive other communications from this organization about your application. Click **Continue**.
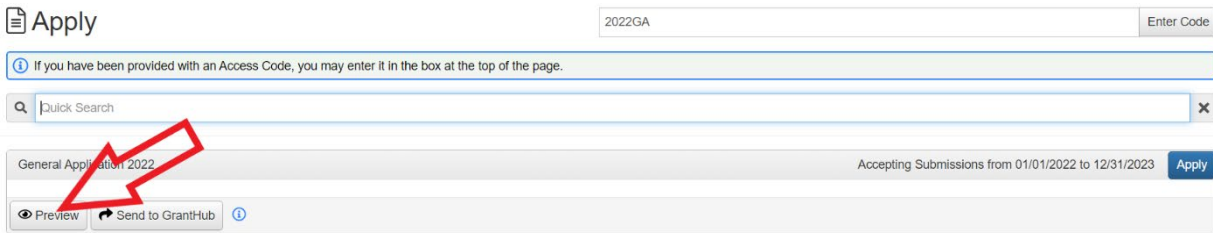
Apply for a Grant

1. Click **Apply** to reach the Apply page, which lists the available grant opportunities and details about each.
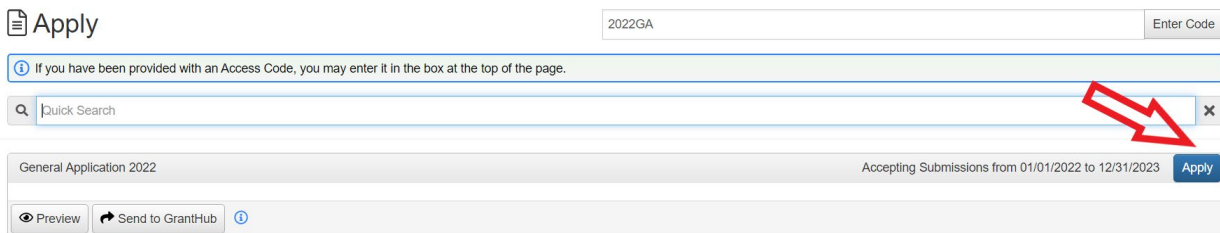

   If you were provided with an access code, enter it in the upper right-hand corner and click **Enter Code**.
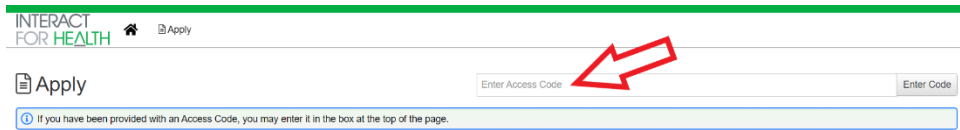
   Click **Preview** for any grant opportunity on the page if you'd like to view the first form without starting a grant request.

2. Click **Apply** for a grant opportunity when you're ready to start a request.

3. You'll arrive at the first form for the request, which is usually an LOI or application.
   If there's a deadline to submit the form, it's listed at the top of this page.

   ☐ Application

   ⚠ Due by 12/31/2022 11:59 PM EST.

   ⓘ Fields with an asterisk (*) are required.

   Click **Question List** to download a copy of the form.

   ☐ Application   📖 Document Viewer   📄 Application Packet   📄 Question List

   ⓘ Fields with an asterisk (*) are required.

   Click **LOI Packet** or **Application Packet** to download a PDF copy of the form once you've completed it.

   ☐ Application   📖 Document Viewer   📄 Application Packet   📄 Question List

   ⓘ Fields with an asterisk (*) are required.

4. Complete the questions on the form.
   Required questions are marked with an asterisk.
   The system auto saves your work every 100 characters you type and when you click out of a question. You can also click **Save** at any time.

   ⚠ Due by 12/31/2022 11:59 PM EST.

   Abandon Request   Save Application   Submit Application

5. Click **Submit** when you're ready to submit the form.

   ⚠ Due by 12/31/2022 11:59 PM EST.

   Abandon Request   Save Application   Submit Application

6. The system notifies you of any required questions that were missed. Complete those questions and then click **Submit** again on the form.
   The form cannot be edited once it's submitted.
7. You'll receive a confirmation message when your form is successfully submitted.
   Click **Continue**.

Your Dashboard

1. Click the **Home** icon to access your Dashboard.

2. There are two tabs on your Dashboard:
   Active tab - contains your draft requests, submitted requests still under consideration, and any approved requests that are still active.
   Historical tab - contains any of your other requests that are no longer active.

Applicant Dashboard

⭐ Public Profile

Applicant:	Organization:
Mx. Sam Sample	Interact for Health
applicant@invalid.org	31-0932681
	513-458-6600
	8230 Montgomery Rd, Ste 300
Contact Email History	Cincinnati, OH 45236 United States

ⓘ If your organization information does not appear correct, please contact the funder. Thank you.

Active Requests 0   Historical Requests 0

3. The actions you can take on forms for a request depend upon the form's status.
   Click **View** to see a form you've already submitted.

Process: General Application 2022

Application	Submitted	10/17/2022		View Application
Decision	Approved	10/31/2022		View Details

Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Direct Deposit for Grantee Payments	Carrie Baker	Overall Award		Complete	View
Annual Report 1 (General Operating Support)	Carrie Baker	Overall Award	01/31/2024 05:00 PM EST	Assigned	Edit
Final Report (General Operating Support)	Carrie Baker	Overall Award	01/31/2025 11:59 PM EST	Assigned	Preview

Documents uploaded by Administrator

DESCRIPTION	FILE
Grant Agreement - signed 11.8.22	Grant Agreement - signed 11.8.22.pdf

Click **Edit** to continue working on a form you haven't yet submitted.
This includes follow up forms which might be assigned if your request is approved.

Process: General Application 2022						
Application	Submitted	10/17/2022		View Application		
Decision	Approved	10/31/2022		View Details		

Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Direct Deposit for Grantee Payments	Carrie Baker	Overall Award		Complete	View
Annual Report 1 (General Operating Support)	Carrie Baker	Overall Award	01/31/2024 05:00 PM EST	Assigned	Edit
Final Report (General Operating Support)	Carrie Baker	Overall Award	01/31/2025 11:59 PM EST	Assigned	Preview

Documents uploaded by Administrator

DESCRIPTION	FILE
Grant Agreement - signed 11.8.22	Grant Agreement - signed 11.8.22.pdf

For an approved request, you might see the option to click **View Details**. This displays more information about the grant award.

Process: General Application 2022						
Application	Submitted	10/17/2022		View Application		
Decision	Approved	10/31/2022		View Details		

Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Direct Deposit for Grantee Payments	Carrie Baker	Overall Award		Complete	View
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Documents uploaded by Administrator

DESCRIPTION	FILE
Grant Agreement - signed 11.8.22	Grant Agreement - signed 11.8.22.pdf

4. Click your **name** in the upper-right corner of the page to view additional options.

Click **Edit My Profile** to update your contact information or password.
Click **Edit Organization** to update your organization's information.
Click **Sign Out** to log out of the site.

Additional Information About Completing Forms

Some questions have character limits.
- o You will not be allowed to submit the form until the length of your responses to these questions fits within the character limits.
- o Responses that are longer than the limit will be saved, but an error message will appear informing you that the limit has been exceeded.

File upload questions only accept one file per question.
- o If you attempt to upload a file that is larger than the limit, you will receive an error message informing you that the file is too large and the file will not be saved.
- o If you attempt to upload a file in an unaccepted file type, you will receive a warning that the file type is not acceptable; you will not be able to upload the file.
- o Once a file has been uploaded, it can be deleted by clicking the red X next to the file name.

If you've been assigned multiple follow up forms, you must complete them sequentially by due date. You'll see the option to edit and submit the follow up with the earliest due date, but you will not see that option for the other follow ups yet. You might also see the option to preview and save your work on forms with later due dates, but you still must submit the forms in order by due date.

Inviting Collaborators to Your Request

1. Click **Collaborate** in the upper right corner of the screen as you're working on a form within your request (e.g. the LOI, application, a follow up form).
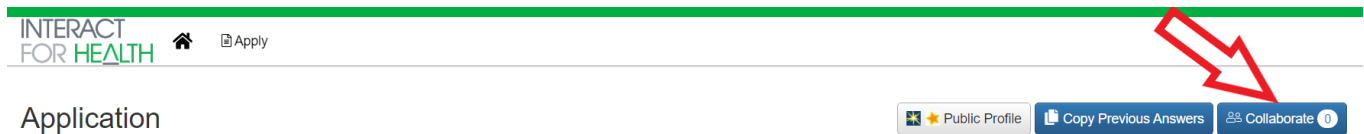
2. In the pop-up that appears:
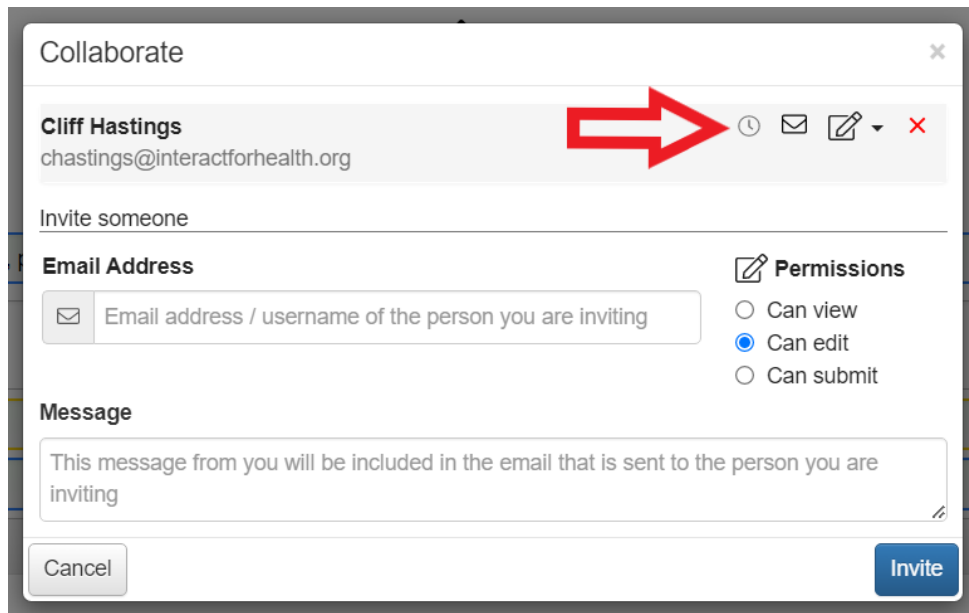
   Enter the email address for the person you'd like to collaborate with on your request.
   Type a message to that person, letting them know what you need them to do.
   Select the permission level for this collaborator (view, edit, or submit).
   > ***Please note:*** these collaborator permissions apply to *all forms* within your request (e.g. the application and any follow ups assigned to you). If you select edit, for example, the collaborator can edit any forms within your request.
   Click **Invite**.

3. The system now sends an email invitation to the collaborator.
4. After sending the invitation, you'll see options in the pop-up for managing the collaborator you just invited (as well as any other collaborators you already invited). Here you can:
   - View the status of the invitation (i.e. whether or not it's been accepted).
   - Resend the invitation.
   - Edit the collaborator's permission level.
   - Remove the collaborator from your request.

Collaborator Experience

1. After you click Invite, the collaborator receives an email from the system with your message and a link to log on.
2. When the collaborator clicks the link in the email, they're brought to the Register page (if they haven't already registered for an account).
   - Once they've registered, clicking the link will bring them to the Logon page.
3. After registering or logging on, the collaborator lands on their dashboard. The request you invited them to collaborate on is located in the *Collaboration Requests* tab.
   - They'll see a link to view or edit (depending upon their permissions and the status of the form) each available form in your request.
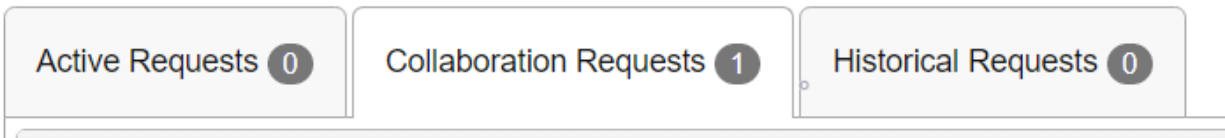
Adding New Users to Your Organization

The collaborator feature can be used to add a new user under your organization in a site without contacting the site's grant administrator.

1. From any existing or new request, click **Collaborate** at the top of a form.

2. From the **Collaborate** pop-up, enter the email address of the person you want to invite to your organization in the site.
3. Select the *Can view* permission level.
4. Type a message to the new user, including the instructions below, and select **Invite**. You may copy and paste this example message if you'd like.

"Please register as a contact with our organization following the steps below.

*Click the link below, enter your name and a new password, then click **Register**.*
*At the top of the dashboard, click **Apply**.*

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*Click **Complete Registration**.*
Click into the Organization drop-down box and select our organization.
*Complete the additional required fields and click **Save**.*

You have now been added to the site under our organization and can log in using your email address and password."

5. If the invited user follows the instructions above, they will be added as a contact under your organization in the site and will have completed their full user registration. This means that they can start new requests in the site just as you can.

Please note: The new user will not be able to view your organization's historical requests in the site. Please contact Director of Grants Manager Kristine Schultz (kschultz@interactforhealth.org or 513-458-6619) to request that the new user be able to view your organization's historical requests.