GOAPPLY USER GUIDE

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 applications and reports.

When you login 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, so they may appear different depending upon the Foundation to which you are applying, however the functionality remains the same.)

GETTING STARTED

HOME PAGE/LOGIN PAGE

The Login Page is the gateway for GOapply applicants. Access the Login Page by going to https://goapply2.akoyago.com/hembar. Everyone must create an account before they can view applications or complete applications.

Click here for Applicant Guide

Scholarship Applicants: Please choose "individual" when registering for an account. Please do not use a school email address as your login email address, as your login email address is the address the Foundation will use as the primary means of communication.

Grant Applicants: Please choose "organization" when you register for a new account. We highly recommend that you use your tax ID number to select your exact organization, rather than manually entering the organization name.

Please contact us if you have any issues.

Sign in to your account

Or create a new account
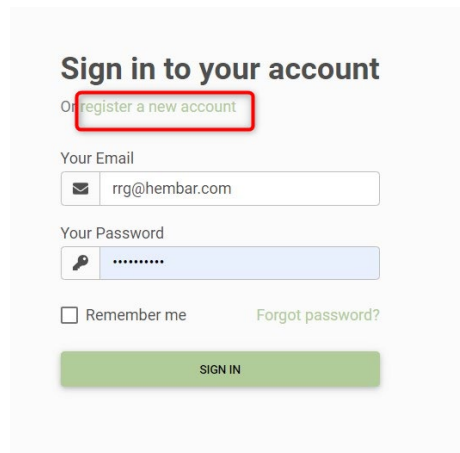
Your Email

✉ rrg@hembar.com

Your Password

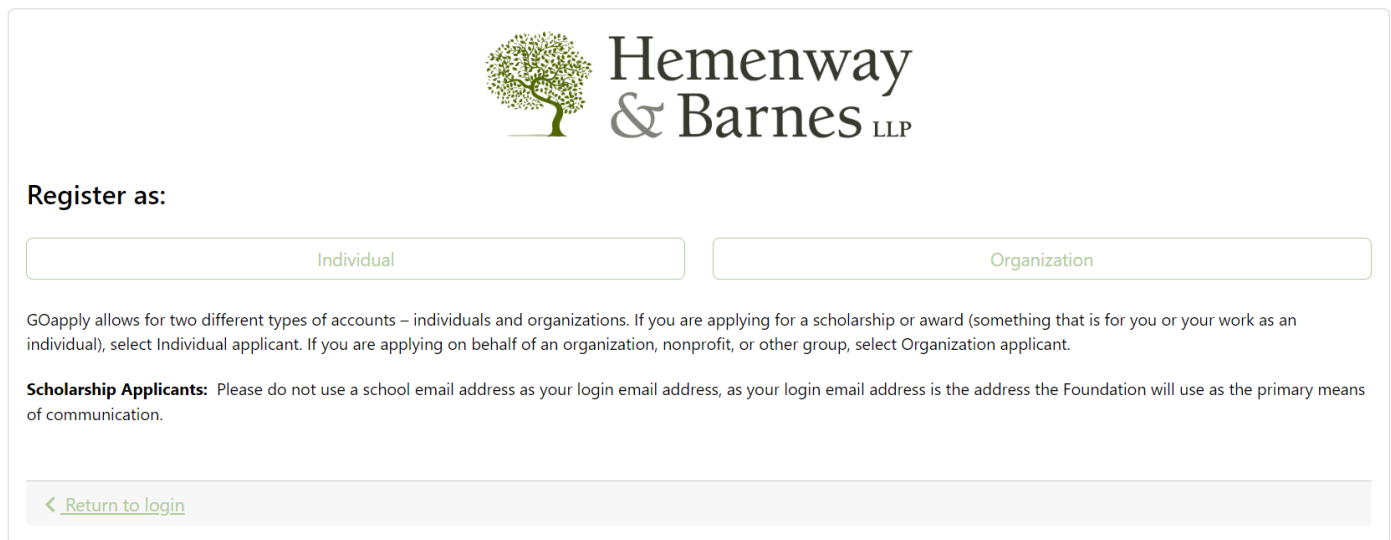🔑 ••••••••••

☐ Remember me   Forgot password?

Sign in

USER REGISTRATION

If this is your first time using GOapply, you'll need to register your account. Access the link provided to you by your Grantmaker. Click the link to register a new account.

You will have the option of registering as an individual or an organization. If you are applying for a scholarship, select Individual applicant. If you are applying on behalf of an organization, nonprofit, or other group, select Organization applicant.

Individual Registration

Fill in the form with your information. The email address you enter will be what you use to log in. Students should not use a school email account, as the Foundation will use that address as the primary means of communication. Click Register.

Scholarship Applicants: Please do not use a school email address as your login email address, as your login email address is the address the Foundation will use as the primary means of communication.

Fill out this information to create your account

* First Name

* Last Name

* Email

* Confirm Email

* Password

* Confirm Password

Your password must be 10-100 characters long.

Register

Organization Registration

Click "Register a new account" on the login screen and select Organization. Depending on the Country selected, you will be prompted to enter a Tax ID/EIN.

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

Name / EIN / Tax ID

Skip, manually enter   Search

With Tax ID

Enter your Tax ID/EIN, then the **Search** button. If you do not know your Tax ID, click on the *US IRS Tax Exempt Organization Search* Tool to find it. If you have a Fiscal Sponsor or different payee, please do not enter a Tax ID/EIN, instead click "Skip, manually enter."

After inputting your Tax ID, GOapply will search for your organization. If your organization is correctly displayed, click **Select**. If not, you can choose to Search Again. (Clicking "Skip" will bring you to the Manual Entry option.)

Organizations matching: 04-2457605   Search again   Skip, manually enter

Philanthropy Massachusetts

Philanthropy Massachusetts, formerly Associated Grant Makers (AGM), was founded in 1969 as a regional association of grant makers with over 125 members in Massachusetts, New Hampshire, and Rhode Island. Philanthropy Massachusetts's mission is to support the practice and expansion of effective philanthropic giving. They provides education, training, convening, networking, leadership for funder collaboratives and public policy education. It also provides programs and services to nonprofits to facilitate grantmaker and nonprofit exchange. Leadership and finance: Philanthropy Massachusetts's 22-member board consists of staff and trustees from member organizations, chaired by Ray Considine of the Charles H. Hood Foundation. Cox staff Kathy McHugh serves as Vice Chair. Ron Ancrum became AGM's president in 2001. He leads 11 staff members in program and member services, information services, and administration. FY01 audit: revenues $2.9 million; expenses $2.4 million; net assets $2 million ($1.3 million temporarily restricted). Proposed 2003 operating budget is $xxx.

133 Federal Street, Suite 802
Boston, MA 02110
AKA: AGM, Associated Grant Makers

[Select]

03 : 501(c)(3) Educational Organization

The next page will be your Organization Profile. Your organization's information will autofill, but you will need to enter contact information. Enter the user's first name, last name, email and password twice. **The email address you enter will be used to log in.** Click **Register**.

Manual Entry

If you register manually, you will be taken directly to your Organization Profile. Fill in the form with the organization's information and main contact information. The email address you enter will be used to log in. Click Register. Note: You should only register manually if your Organization does not have a Tax ID, are using a Fiscal Sponsor, or have a different payee (as in the case of Sponsored Research or University funding). You will be prompted to enter your Fiscal Sponsor information in the application.

If a registrant already exists with that email, at the top of the screen will display the following message:

Username [email address] is already taken.

Otherwise, a message indicating registration completed successfully will appear.
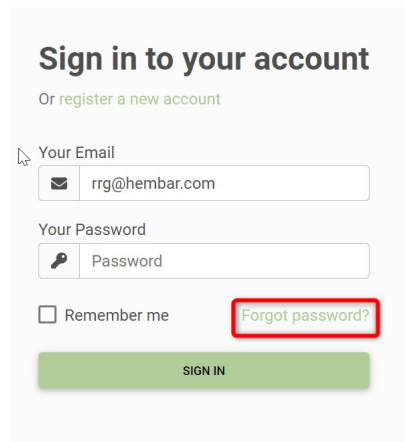

Registration completed successfully

Your registration is under review, once complete we'll send you an update.

[RETURN TO LOGIN]

You will receive an email indicating you have been approved with Submitter permissions. Once you receive the email, you can login.

Password Assistance

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

Sign in to your account

Or register a new account

Your Email

✉ rrg@hembar.com

Your Password

🔑 Password

☐ Remember me   Forgot password?

SIGN IN

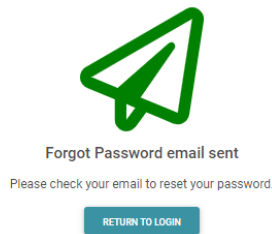Enter your email address and Click the RESET PASSWORD button.

Enter your email

* Email

✉

RESET PASSWORD

A message will appear indicating the reset password link has been sent to the email:

Forgot Password email sent

Please check your email to reset your password.

RETURN TO LOGIN

You will receive an email with the following message:

You have requested to reset your password

We cannot simply send you your old password. A unique link to reset your password has been generated for you. To reset your password, click the following link and follow the instructions. This password reset link is only valid for 24 hours.

RESET PASSWORD

If you didn't request a password reset, you can ignore this email. Your password will not be changed.

After clicking on the **RESET PASSWORD** link, you will be prompted to enter your email address and a new password twice. Click RESET PASSWORD.   A message will appear indicating the password has been reset. The user can then click the link **Please click here to login.**

After you login, 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.
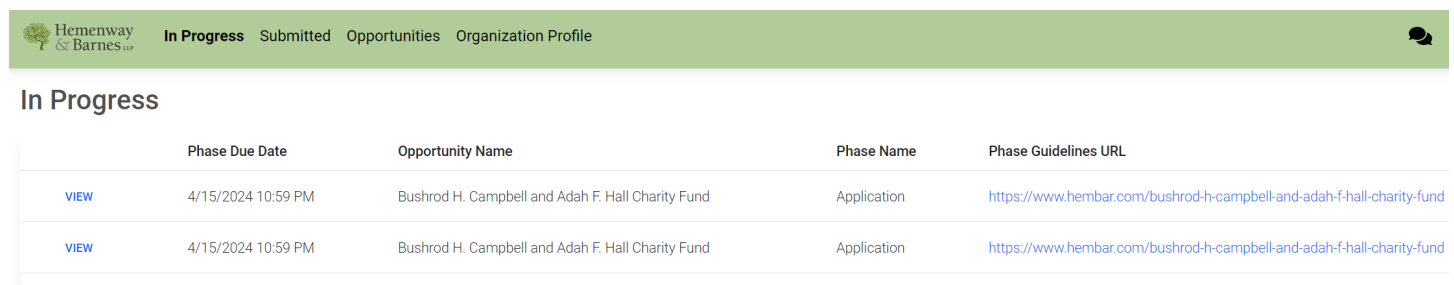
Once you are logged into GOapply, you'll see three links at the top of the page, In Progress, Submissions and Opportunities. Organizational applicants will see a fourth link for their Organizational Profile.
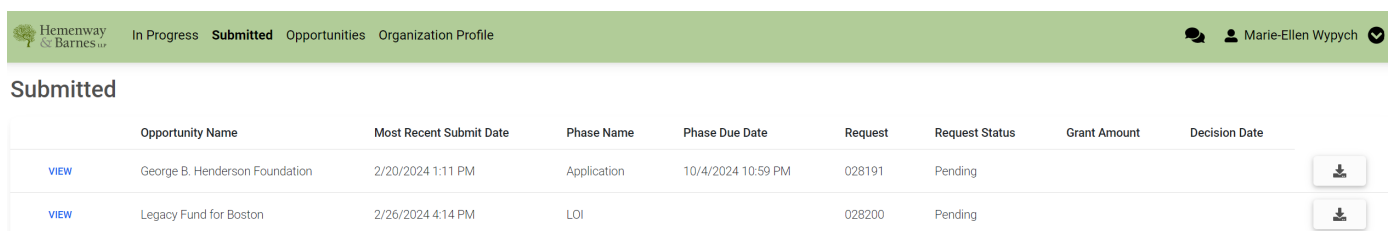

In Progress

The *In Progress* dashboard shows which applications you have in progress.

Submitted

The *Submitted* dashboard allows you to view your submitted applications. Click the **View** link to view your submitted application or download the submitted application in PDF by clicking the download button all the way to the right. Changes to an application cannot be made after submitting.

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.

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

Starting an application

If your application is by **Invitation Only**, click the **In Progress** link at the top of the page. The application homepage is where you can find the due date, summary, brief description, and the guidelines for that application. Then, click on the **VIEW** link for the corresponding opportunity for which you would like to apply.

Otherwise, click on **Opportunities**. Then, click on the **VIEW** link for the corresponding opportunity for which you would like to apply.

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, which can be finished from the In-Progress dashboard.

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 Organization information, if applicable. If anything is missing or inaccurate, click I Need to Fix, edit information, and click Submit Changes.

Click the green **SUBMIT** button at the bottom of the page to save your changes. Then click the white **CONTINUE TO SUBMISSION** button to continue the application.

You can then begin entering information on the application form. An red asterisk (*) indicates a required field. If data is missing from a required field a dialog box will populate after clicking the Next (or Submit) button indicating a response is required. At the bottom of each page, choose **SAVE DRAFT** to save your changes and remain on the page. Click **NEXT** to save your changes and go to next page. Remember to always save your work by clicking the SAVE DRAFT button. When you're finished with the phase, click Submit.

You will receive a confirmation email confirming your successful submission, and a pdf document of your application will be attached to the email. You can also download a PDF copy of your completed application for your records by

1. Clicking on Submitted in the top bar
2. Clicking on Download Submitted PDF icon

Next Phase of the Application Process

If the application has multiple phase (e.g., Letter of Inquiry>Application>Report), the Foundation will make the next phase is available, and it will appear in your In-Progress dashboard. You will receive an email notification when the next phase becomes available. Click on the **VIEW** link to open the corresponding Phase form to complete.

There is only one page with one field for reports. Click on the link to download the report template, complete the questions, upload the document, save it in the portal and submit the report.

TIPS ON NAVIGATING PAGES AND ENTERING DATA

- You can also click the Pages drop-down to move to another page.
- To navigate back to the main menu, click Applicant at the top of the screen
- Tool Tips - When available, applicant can hover over the question mark next to each question to gain more information on how to answer the question.
- A red asterisk (*) indicates a required field. Applicants will be able to move from page to page without filling in a required field; however, they will be unable to submit an application until all the required fields

are filled in. When Applicants click the submit button, you will be taken to the first required field that was not entered.

- We recommend not entering unique symbols such as &,*,%,or #. While they can be entered and will not be a problem with application submission, they may render different on the .pdf report.
- Inactivity: If you have not saved any information for 60 minutes and then try to save or enter information, you will get a page error. Any unsaved information will be lost. Simply click the back button and sign in.

If you need assistance at any time during the application process, please contact Rita Goldberg, Senior Grants Manager at rrg@hembar.com or 617-557-9766