GUIDEBOOK
Submitting an Application
to the Grant Management Portal

July 2019
GENERAL INFORMATION

Proposals must be submitted through the Foundation’s grant management portal: https://giveportal.smapply.io/. The grant management portal works best using **Chrome or Firefox** web browser.

For questions regarding the Request for Proposals, please email: [grantinquiries@steveandalex.org](mailto:grantinquiries@steveandalex.org).

INSTRUCTIONAL OVERVIEW – READ FIRST

Submitting an application is a mandatory 4-part process, which is described in detail throughout this document and outlined below. Without completing each of these processes, an application may be deemed incomplete and may not be considered for review.

**Part 1:** Register for an Applicant Account (as an Individual)

**Part 2:** Register under an Organization

**Part 3:** Complete eligibility questions

**Part 4:** Submit an Application
REGISTER FOR AN APPLICANT ACCOUNT (AS AN INDIVIDUAL)

START: Landing page for Grant Management Portal  https://giveportal.smapply.io/

The Steven & Alexandra Cohen Foundation is excited to introduce the new grants management portal for application submission, processing and monitoring. Starting in June 2019, all grant applications to the Foundation will be processed through this grant management portal. The Foundation invites new grant applications using published Requests for Proposals (RFPs) or direct invitation to specific organizations. In order to reduce our environmental impact, no unsolicited requests by mail will be accepted.

The next submission time period for new applications will be August 1-15, 2019. In response to the Request for Proposals on Lyme and tickborne diseases (ID#: Lyme 2019-A), Applicants cannot access this portal until the submission period has begun. All pertinent information to support a submission is included in the RFP. Please see the Foundation’s website, www.stevealex.org, for more details or a copy of the RFP.

For questions regarding the Grant Management Portal or Request for Proposals, please email: grantinquires@stevealex.org.

STEP 1: Click [REGISTER] at the top right
**STEP 2:** Complete the Registration form and click [CREATE ACCOUNT]

Register for an applicant account

Register with

[facebook]

[twitter]

[google]

OR

**First name**

**Last name**

**Email**

**Password**

**Confirm password**

By registering for an account, you agree to our [terms of service] and [privacy policy].

I'm not a robot

[reCAPTCHA]

CREATE ACCOUNT

**END:** Registration as an Individual is complete. To submit a grant application, you **MUST** register under an Organization.
REGISTER UNDER AN ORGANIZATION

All applications must be linked to an Organization using an Employer Identification Number (EIN). Therefore, you MUST register yourself under an organization when applying as an individual.

- **NOTE**: A single organization (e.g. Columbia University) can have multiple departments or investigators submit applications independently. Each investigator would register under the organization independently. If the submissions are separate projects, you do not need to coordinate registration with other applicants from the same organization.

START: Registration landing page

STEP 1: Enter your organization's Employer Identification Number (EIN) and click on the Blue Check mark to populate data from GuideStar

- **IMPORTANT DISCLAIMER**: If your Employer Identification Number (EIN) is incorrectly entered into the application, an error may occur in our database. This may have a negative impact on the processing of your grant application, so make sure your EIN is properly entered into the system.

Optional:
If you have a GuideStar profile, you can use it to speed up completion of your organization profile and applications. To use GuideStar, please provide your Employer Identification Number (EIN)

Provide your EIN

[Enter your EIN here]

Don't have a GuideStar profile? Create one here
**STEP 2**: Complete blank fields and click [CONTINUE]

Organization name

STEVEN & ALEXANDRA COHEN FOUNDATION INC

Address (optional)

46 Cummings Point Road

City (optional)  

Stamford

Country (optional)  

United States of America

Tax country

USA - EIN Number

Tax number

06-1627636

Organization phone number (optional)

Organization email (optional)

Website (optional)

[CONTINUE]

**STEP 3**: After clicking [CONTINUE], you should see the ‘Welcome!’ message pictured below. Click [CONTINUE TO SITE] to begin the application process.

---

**Welcome!**

You have successfully registered for a SurveyMonkey Apply account for Steven & Alexandra Cohen Foundation

[Continue to site]
STEP 4: If prompted, confirm your email address. In SurveyMonkey Apply, click [CONFIRM EMAIL ADDRESS] then look in your email inbox for an email such as below.

In order to validate your SurveyMonkey Apply account we need to verify your email address. Please click the following link in order to validate the email address on the account.

Thanks,
The SurveyMonkey Apply Team

Confirm email address

STEP 5: Select [CONTINUE]

Apply

Thanks!

Your email address is now verified.

Continue
COMPLETE ELIGIBILITY QUESTIONS

START: Landing page after Registration

STEP 1: Click [VIEW PROGRAMS]

No applications.

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

View programs

STEP 2: Click [CONTINUE FILLING OUT ELIGIBILITY FORM]

To get started, fill out your eligibility profile

Continue filling out eligibility form
STEP 3: Complete the Eligibility Quiz and click [SAVE MY PROFILE]

Eligibility Quiz

Is your organization recognized by the Internal Revenue Service as a charity having tax-exempt status under section 501(c)(3)?
- Yes
- No

Does the planned funding request(s) to the Foundation include activities and operations exclusively based in the United States of America (USA)?
- Yes
- No

I'll do this later  Save my profile
SUBMIT AN APPLICATION

To submit an application, you must complete two (2) tasks:

1. Abstract (Steps 1 – 6 below)
2. Full Application (Steps 7 – 13 below)

➢ IMPORTANT DISCLAIMER: An application is NOT complete until submitting both the Abstract and Full Application. To successfully apply for a grant, please carefully follow all directions noted below.

START: Program landing page

STEP 1: Click [MORE >] to apply for the “Cohen Lyme and Tickborne Disease Initiative”

Programs

Cohen Lyme and Tickborne Disease Initiative
Accepting applications from Jul 26 2019 12:00 AM (UTC) to Jul 25 2019 11:59 PM (UTC)
Research and programmatic grants related to Lyme and other tickborne diseases.

STEP 2: Click [APPLY]

➢ Completing the Application has two (2) parts – the Abstract and the Full Application
➢ IMPORTANT DISCLAIMER: An application is NOT complete upon submitting both parts. To successfully apply for a grant, please carefully follow all directions noted below.
STEP 3: In the “Your tasks” section, click [ABSTRACT]

STEP 4a: If you have a GuideStar profile, click [USE GUIDESTAR]

---

Employer Identification Number (EIN)
STEP 4b: Re-enter your EIN

(1.A.0) EIN: Employer Identification Number

STEP 5: After populating fields in the Abstract, click [MARK AS COMPLETE] and then click [REVIEW & SUBMIT] on the left side.
STEP 6: Click [SUBMIT YOUR APPLICATION] at the bottom of the screen.

IMPORTANT: ALTHOUGH THE PROMPT STATES “APPLICATION SUBMITTED”, YOU HAVE ONLY SUBMITTED THE ABSTRACT. YOU MUST NOW SUBMIT THE FULL APPLICATION.
STEP 7: Click [GO TO MY APPLICATIONS]

Application Submitted!
Thank you for submitting your application.

Go to My Applications
OR
View more Programs

STEP 8: Click [START]

Cohen Lyme and Tickborne Disease Initiative
0000000052

EVANGELICAL LUTHERAN CHURCH IN

0 of 1 tasks complete
START
**STEP 9:** Click [FULL APPLICATION – RESEARCH GRANTS]

**STEP 10:** Click the ‘ATTACHED APPLICATION TEMPLATE’ link to download the Full Application template.

- Complete the template with all the necessary information for the Foundation’s review.
- Click [UPLOAD A FILE] to upload your completed template.

---

**Full Application - Research Grants**

**Background**

**Grant Application. Use template provided.**

Please download the attached application template, complete the template, and upload the application here.

[Upload a file]
STEP 10: After populating the remaining fields, click [NEXT]

➤ NOTE: Both the Proposed Total Budget and Multi-year Budget need to be equivalent.

STEP 11: Click [MARK AS COMPLETE]

Full Application - Research Grants

Please click Mark as Complete to Finish

STEP 12: Click [REVIEW & SUBMIT] on the left side

Full Application - Research Grants

Grant Application. Use template provided.
Please download the attached application template, complete the template, and upload the

**CDC - How many people get Lyme disease.docx**

Budget
STEP 13: Click [SUBMIT YOUR APPLICATION]

- NOTE: The Abstract is displayed at the top of the page. If you scroll down the Full Application content is visible.

END: The submission is complete.
NOTE: To confirm that your submission was received,

- Click [Go to My Applications].
- A completed application will show a gray [VIEW] button only. Click [VIEW].

The application only shows “Previous Tasks” and no section for “Your Tasks”.

- Both the “Abstract” and “Full Application” should have a Green check mark and display “Completed on: ...”
SUBMIT MULTIPLE APPLICATIONS (OPTIONAL)

START: Return to the “Programs” page

STEP 1: Click [MORE >]

Programs

Cohen Lyme and Tickborne Disease Initiative

Accepting applications from Jul 26 2019 12:00 AM (UTC) to Jul 26 2019 11:59 PM (UTC)

Research and programmatic grants related to Lyme and other tickborne diseases.

See my application

STEP 2: Click [APPLY] button on the right

2 Applications

APPLY

Opens

Jul 26 2019 12:00 AM (UTC)

Deadline

Jul 26 2019 11:59 PM (UTC)
ADD MEMBERS TO YOUR TEAM / ORGANIZATION (OPTIONAL)

**STEP 1:** Click [Manage Organization] at the top right

**STEP 2:** Click [Members]

**STEP 3:** Click on [Add member]

**STEP 4:** Click [Use GuideStar to update profile] – if desired
GETTING SUPPORT

For technical support on the grant management portal, use the Survey Monkey Apply support feature. Click on the (i) in the top right corner.

For questions about the application content, please email grantinquiries@steveandalex.org.