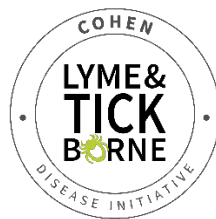# Steven & Alexandra Cohen Foundation

Cohen Lyme and Tickborne Disease Initiative

GUIDEBOOK

Submitting an Application

to the Grant Management Portal

July 2019

CONTENTS

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.

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/

Grant Management Portal

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 (RFP) 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.steveandalex.org, for more details or a copy of the RFP.

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

STEP 1: Click **[REGISTER]** at the top right

STEP 2: Complete the Registration form and click **[CREATE ACCOUNT]**

Apply

Register for an applicant account

Register with

[f] [twitter] [G]

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
Privacy - Terms

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

06-1627638

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

06-1627638

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.

Apply

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]**

GI♥E
STEVEN & ALEXANDRA COHEN FOUNDATION

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 <u>exclusively</u> 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 26 2019 11:59 PM (UTC)
Research and programmatic grants related to Lyme and other tickborne diseases.

MORE >

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]**

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

‹ Back to application

Cohen Lyme and Tickborne Disease...
0000000040
ID: 0000000040

✅ 📄 Abstract ›

1 of 1 tasks complete

Last edited: Jul 26 2019 05:04 PM (EDT)

REVIEW & SUBMIT

Deadline: Jul 26 2019 07:59 PM (EDT)

✅ 📄 Abstract
Completed Jul 26 2019 05:04 PM (EDT)

Abstract

Employer Identification Number (EIN)

Please (re-) enter your Employer Identification Number (EIN)

If the Guidestar information has not automatically populated below, please b

1. Enter the EIN in your Organization Profile;
2. Clicking on the "Guidestar" button at the top of the Organization Profi
3. Re-enter the EIN on this application page.

For more detailed instructions on EIN, Guidestar and registering as an Indivi
download these instructions.

(1.A.0) EIN: Employer Identification Number	06-1627638

STEP 6: Click **[SUBMIT YOUR APPLICATION]** at the bottom of the screen

< Back to application

Cohen Lyme and Tickborne Disease Initiative ⤤   ⬇ Download
0000000040

🔒 STEVEN & ALEXANDRA COHEN FOUNDATION INC   ID: 0000000040   Last edited: Jul 26 2019 05:18 PM (EDT)

BN   Bennett Nemser (Owner)
     Primary administrator — View & edit

Your tasks

| Abstract | 100.0% complete
Submitted on: Jul 26 2019 05:09 PM (EDT) | ︿ |

✅ 📄 Abstract   Completed: Jul 26 2019 ︿

Abstract

Abstract

Employer Identification Number (EIN)

Please (re-) enter your Employer Identification Number (EIN)
If the Guidestar information has not automatically populated below, please be sure to do the following:

1. Enter the EIN in your Organization Profile;
2. Clicking on the "Guidestar" button at the top of the Organization Profile page; and

SUBMIT YOUR APPLICATION

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]**

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.

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]**

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

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.

‹ Back to application

Cohen Lyme and Tickborne Disease Initiative ↗   ⤓ Download
0000000040

🔒 STEVEN & ALEXANDRA COHEN FOUNDATION INC   ID: 0000000040   Last edited: Jul 26 2019 05:18 PM (EDT)

BN   Bennett Nemser (Owner)
     Primary administrator – View & edit

Your tasks

| Abstract | 100.0% complete | ∧ |
| | Submitted on: Jul 26 2019 05:09 PM (EDT) | |

✔ 📄 Abstract   Completed: Jul 26 2019 | ∧

Abstract
___
Employer Identification Number (EIN)
_____

Please (re-) enter your Employer Identification Number (EIN)
If the Guidestar information has not automatically populated below, please be sure to do the following:

1. Enter the EIN in your Organization Profile;
2. Clicking on the "Guidestar" button at the top of the Organization Profile page; and

SUBMIT YOUR APPLICATION

END: The submission is complete.

✔

Application Submitted!

Thank you for submitting your application.

Go to My Applications

OR

View more Programs

➢ **NOTE: <u>To confirm that your submission was received</u>**,

  ❖ Click **[Go to My Applications]**.

  ❖ A completed application will show a gray **[VIEW]** button only. Click **[VIEW].**

  ❖ The application only shows "**Previous Tasks**" and <u>no</u> 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   MORE >

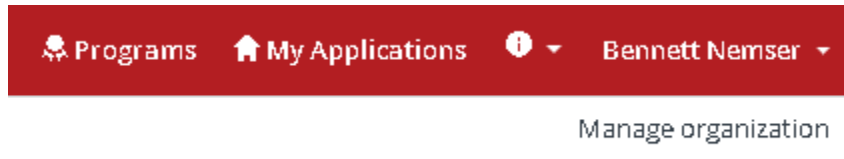**STEP 2:** Click **[APPLY]** button on the right
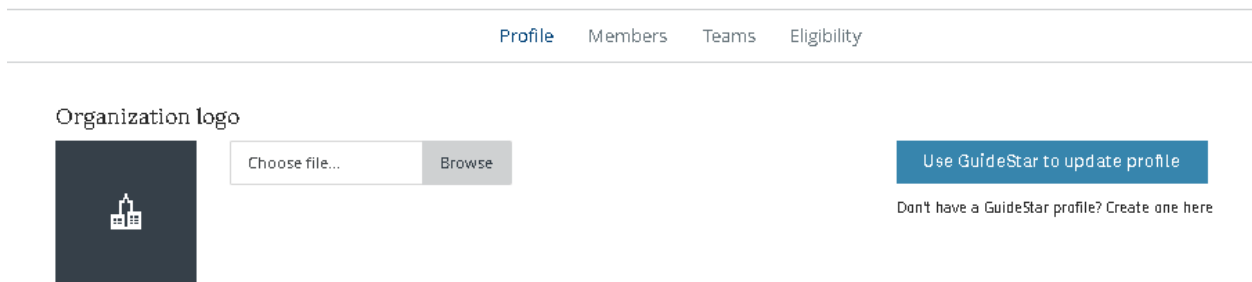
2 Applications

APPLY

Opens
Jul 26 2019 12:00 AM (UTC)

Deadline
Jul 26 2019 11:59 PM (UTC)

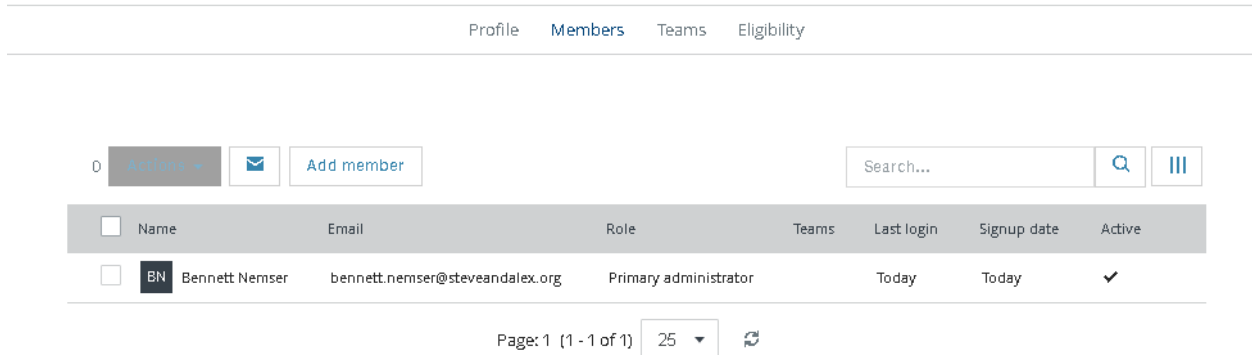# ADD MEMBERS TO YOUR TEAM / ORGANIZATION (OPTIONAL)

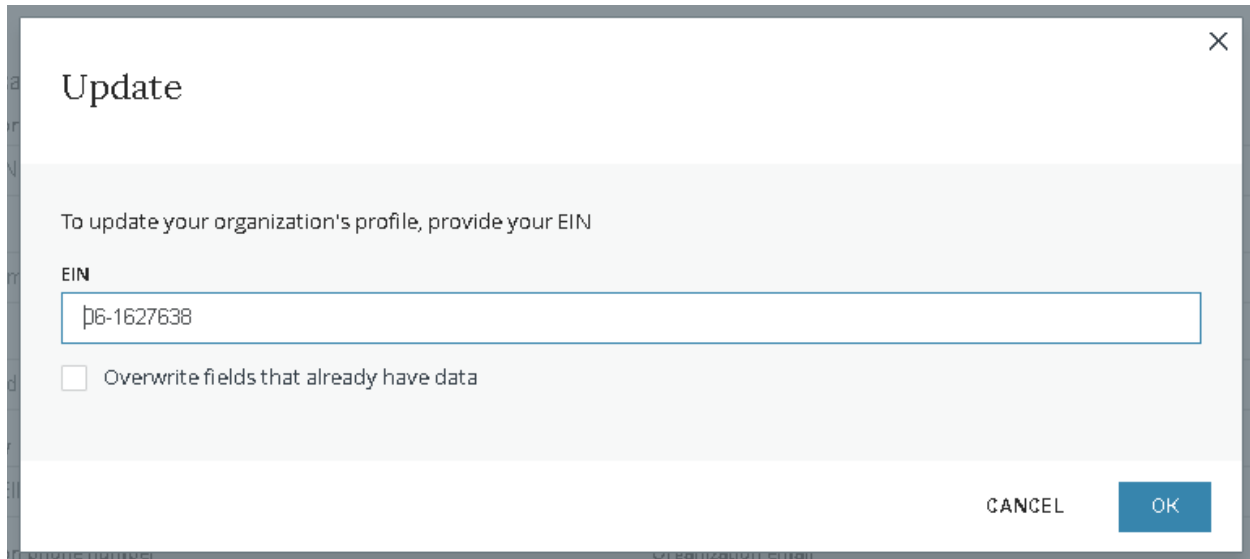**STEP 1:** Click **[Manage Organization]** at the top right

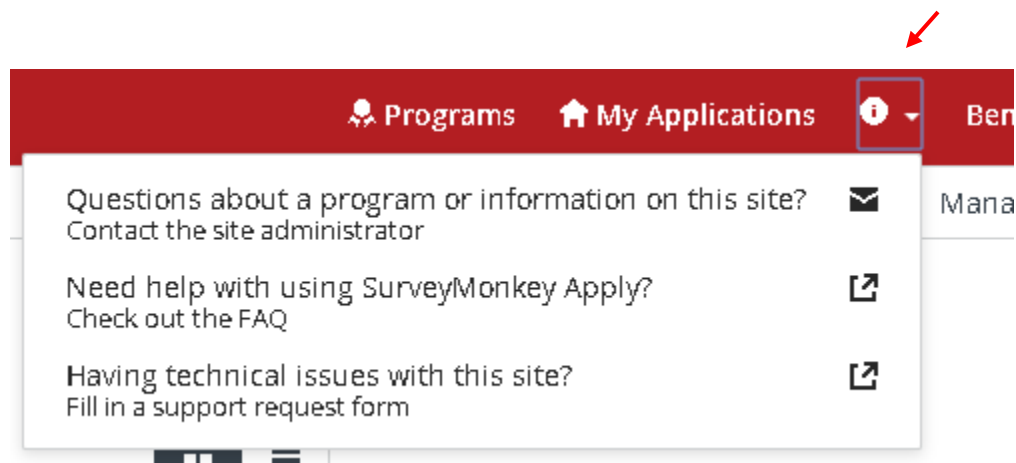**STEP 2:** Click **[Members]**

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.