MidwayUSA Foundation
Grant Application System User Guide

Introduction

The MidwayUSA Foundation offers financial support through endowment programs and annual cash grants. Each endowment program is dedicated to a specific need in the youth shooting sports community. Applications for cash grants are available online through our grant application system, SurveyMonkey Apply (SMApply).

Purpose

Overview of the grant application system, its terms, gaining access, the application process, and profile management.
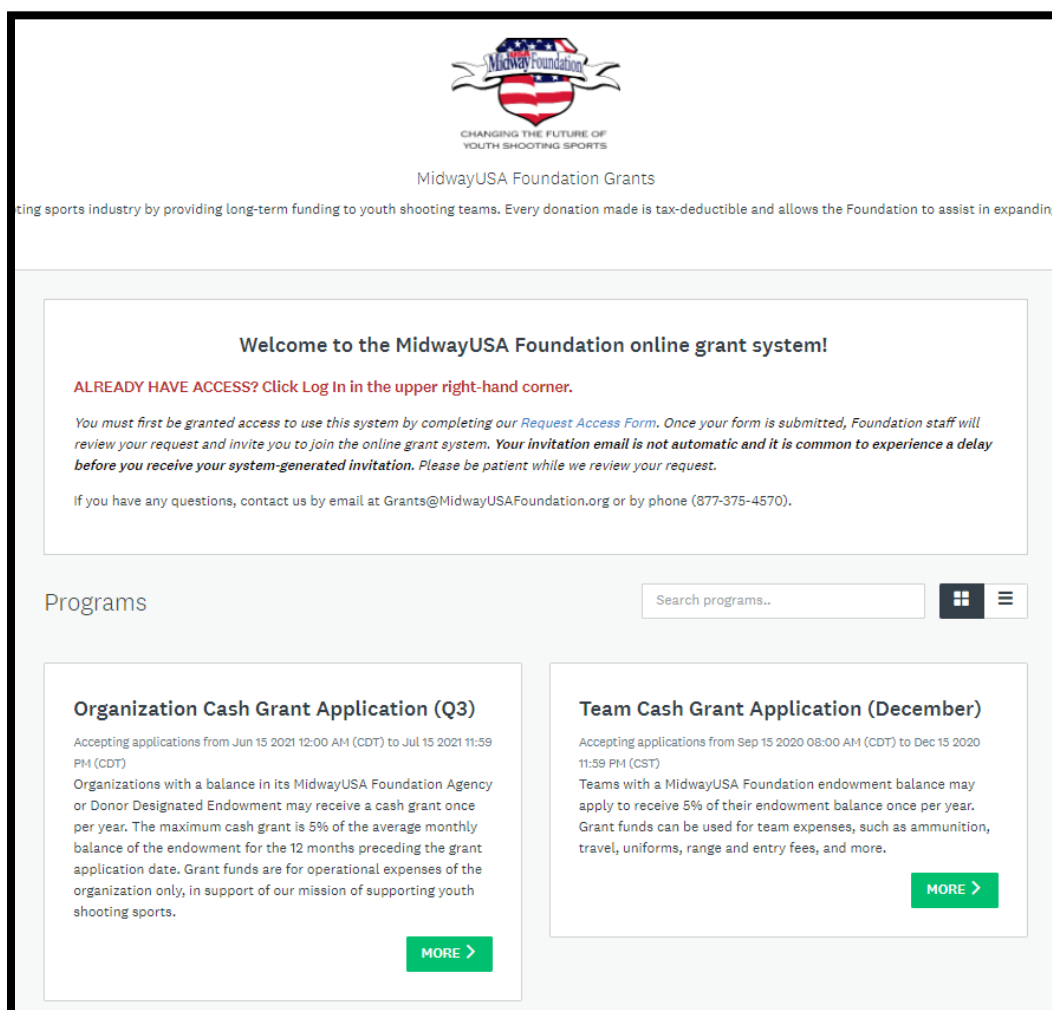
Contents

Main Glossary

➢ **Grant Application System** – online platform for creating, viewing, and submitting cash grant applications

➢ **SurveyMonkey Apply (SMApply)** – grant application system platform provider

➢ **Program** – a cash grant program and the applicable application

➢ **User** – individual with a login and password *(see Member for more)*

➢ **User Profile** – overview of a user's role(s), applications, and preferences

➢ **Organizational Profile** – represents one endowment and its basic information

➢ **Primary Administrator** – owner of an organizational profile, see full definition under **User Glossary**

➢ **Member** – user associated with an organization's profile

➢ **Task** – application section with questions to collect applicant information

➢ For more terms, see the **Application Glossary** or **User Glossary**

Detailed Instructions

➢ **How to add a Member to my organization's profile**

➢ **How to add a Member to my application**

➢ **How to request a second signature**

➢ **How to change the name of my organization's profile**

➢ **How to change my email address**

➢ **How to change the Primary administrator of my organization's profile**

Programs and Applications

Cash grant programs and applications are listed on the Foundation's main page of the grant application system, https://musaf.smapply.org/. Here, you can view a program's open and deadline dates, as well as an overview of the applicable guidelines. Click *More* to view the program guidelines in detail, and to see if your organization is eligible to apply.
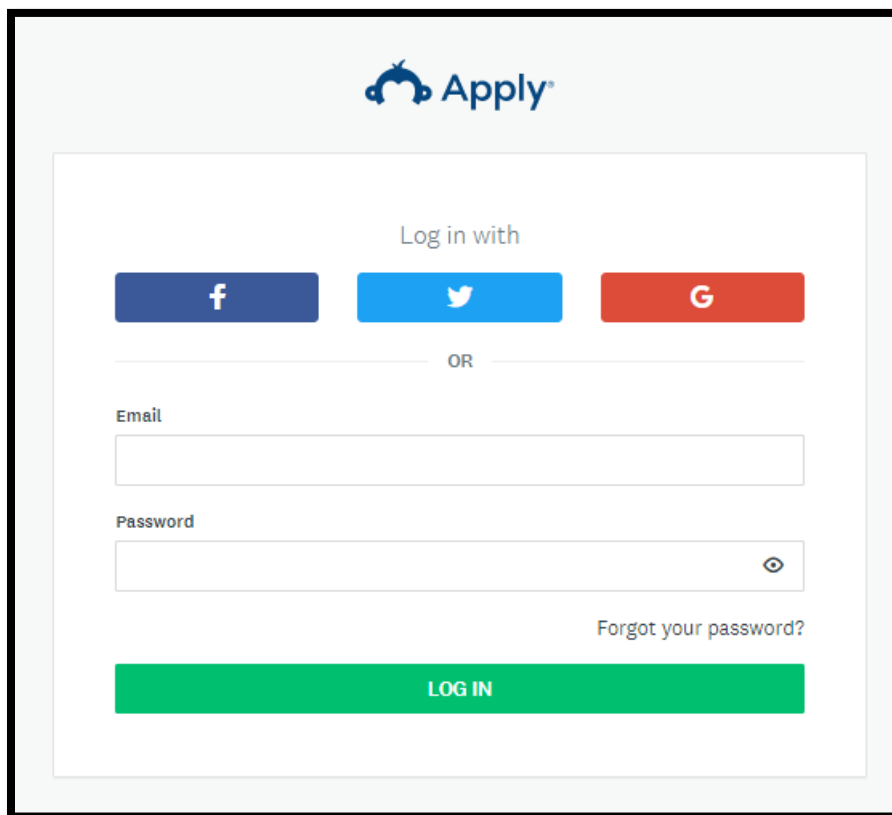
System Access

Our grant application system requires a login with an email and password. Applications are available to endowment holders who have access to the system. Access is gained by request <u>or</u> by invitation to join an existing profile *(an organizational profile represents an endowment holding organization).*

To confirm your organization's access status, please email Grants@MidwayUSAFoundation.org with your E*ndowment Name* and *Endowment ID*.

Existing users may login at https://musaf.smapply.org/acc/l/ with their email and password.
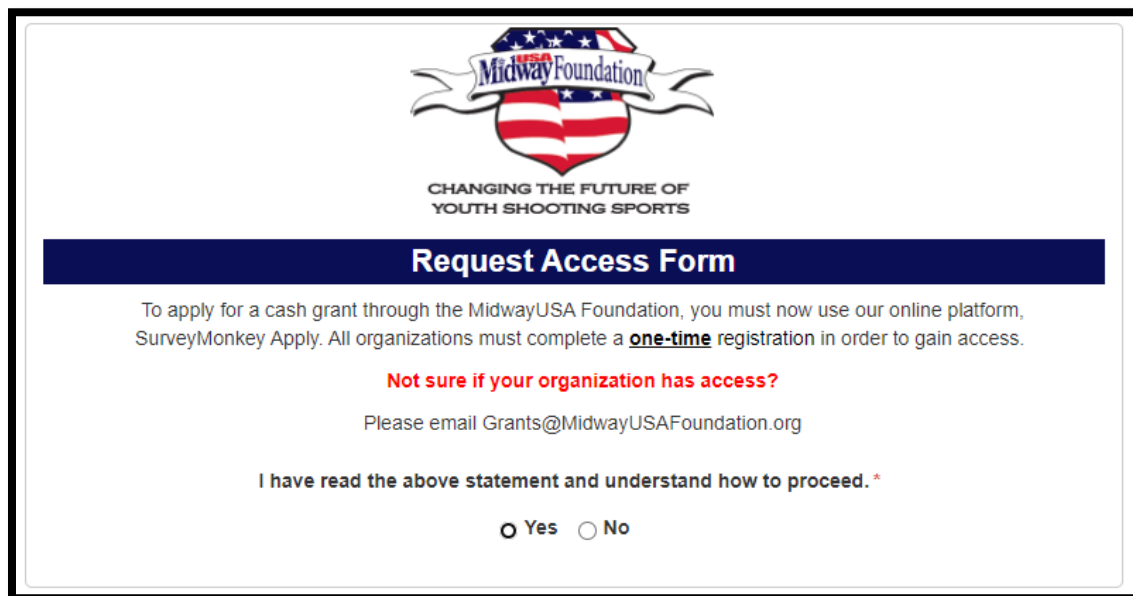
Requesting Access

Visit our Grants page and select the applicable cash grant program. Click on the *Request Access* button to view the *Request Access Form*.

Complete the screening questions to determine if your organization already has access.

If your organization **does not** have access, you will be prompted to provide your basic endowment information and contact information *(Endowment Name, Endowment ID, State, First and Last Name, Phone Number, and Email Address)*. Approved organizations will be added to the system and an invitation to join will be sent to the email address provided *(please note, an invitation email could end up in your spam/junk folder)*.

If your organization **already** has access, you will be prompted to email Grants@MidwayUSAFoundation.org. In your email, please summarize your request for access and include your *Endowment Name* and *Endowment ID*. Foundation staff will be in touch regarding next steps.

Joining the System

New users will receive an emailed invitation to join the system. To confirm your access, you must do so from within the invitation email *(be sure to check spam/junk folder if not found in your main inbox)*. Click the link within your invite to confirm access and verify your email address. Utilizing this link prompts you to create a unique password, thus completing the creation of your user profile. Please save your newly created password as you will need it for future logins.

Dear Heather Laws,

Welcome to MidwayUSA Foundation's online grant system. This online grant system is safe, secure, and much quicker and easier than a paper application. All cash grants <u>must</u> be submitted through this online system. Paper applications will no longer be accepted. If you have any questions, you may reply to this email or call us at (877) 375-4570.

We look forward to funding your shooting sports organization!

Please click the Join now button below to complete the process of gaining access to the system.

Thank you,

MidwayUSA Foundation

Join now

If the button is not clickable, please copy and paste this URL into your browser's address bar:

https://musaf.smapply.org/acc/r/p-yB01GSt6bj9efu7-_lnrCMWUzecalggb3qwYlQKwM=/?membership=74443

You are receiving this email from <u>MidwayUSA Foundation Grants</u> - MidwayUSA Foundation.
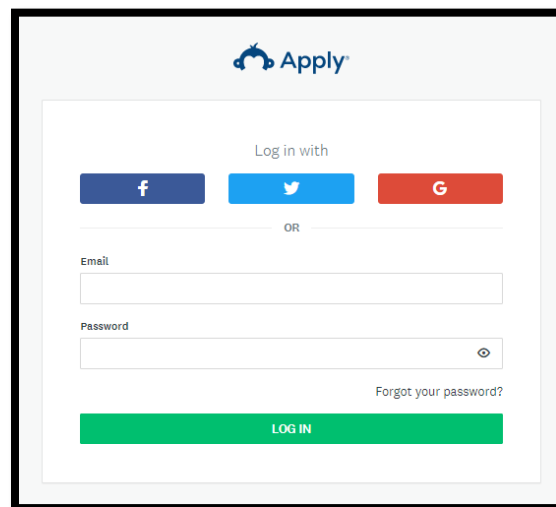
<u>Unsubscribe</u> | <u>Terms</u> | <u>Privacy</u>
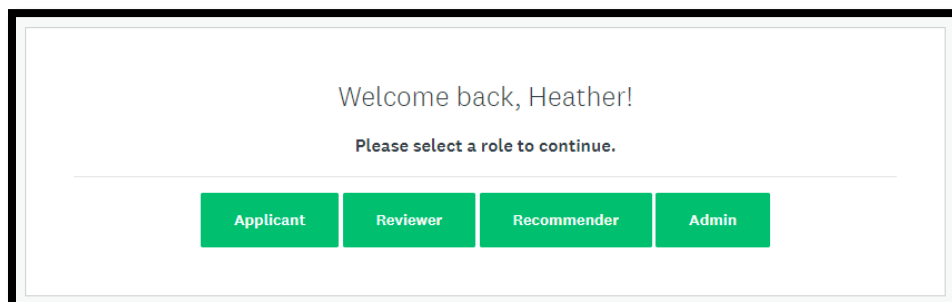
powered by

Apply®

Logging In

Click the *Login* button on any of our dedicated grant program pages to be taken to the login page of the grant application system. You may also utilize, https://musaf.smapply.org/acc/l/.

The *Forgot your password?* link may be used if you forgot or need to reset your password. You will receive emailed instructions on how to reset your password.

Some users may have more than one role and will be asked to select a role when logging in. The *Applicant* role is the primary role to start and submit an application. See the *User Glossary* for definitions of the different roles.
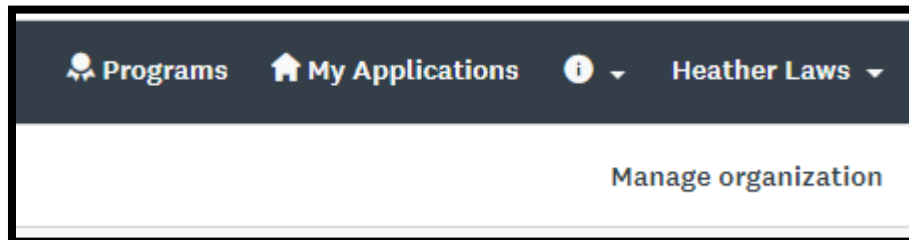

By default, when you login, any <u>open</u> applications for your organization will appear; this includes in progress, submitted, awarded, or declined applications.
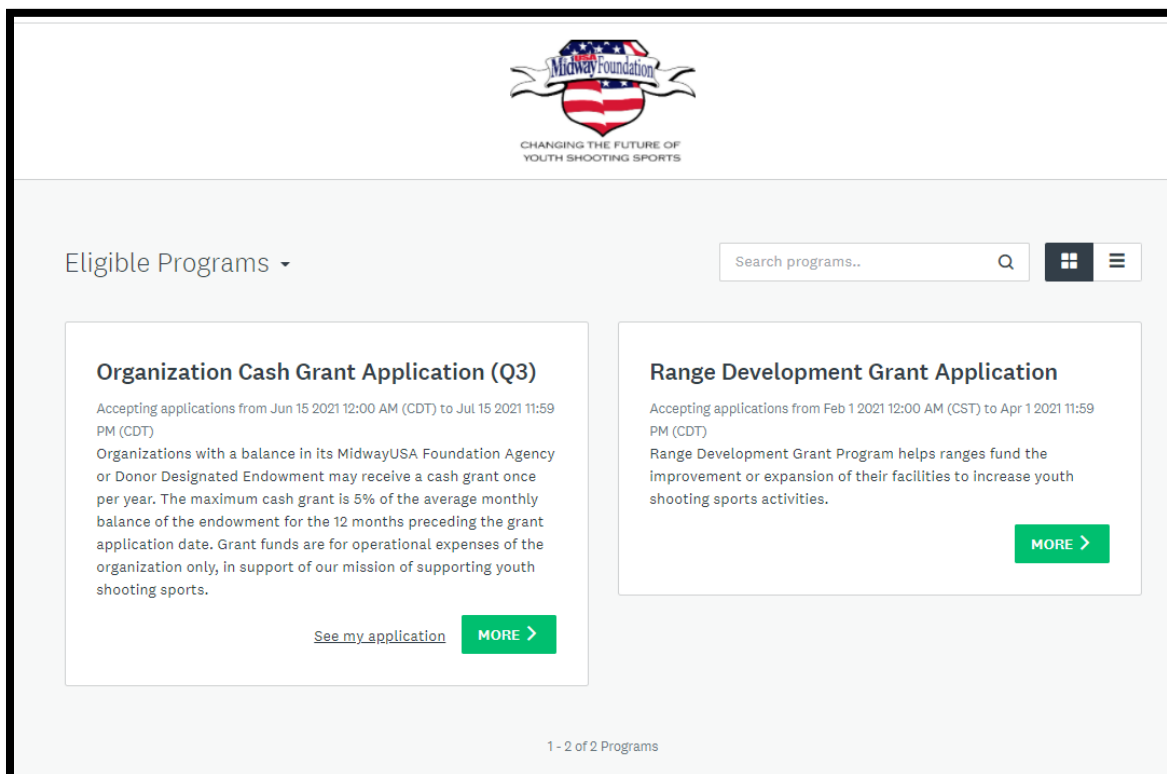
Starting an Application

Click on *Programs* in the upper right corner, to view the available cash grant programs your organization is eligible for.

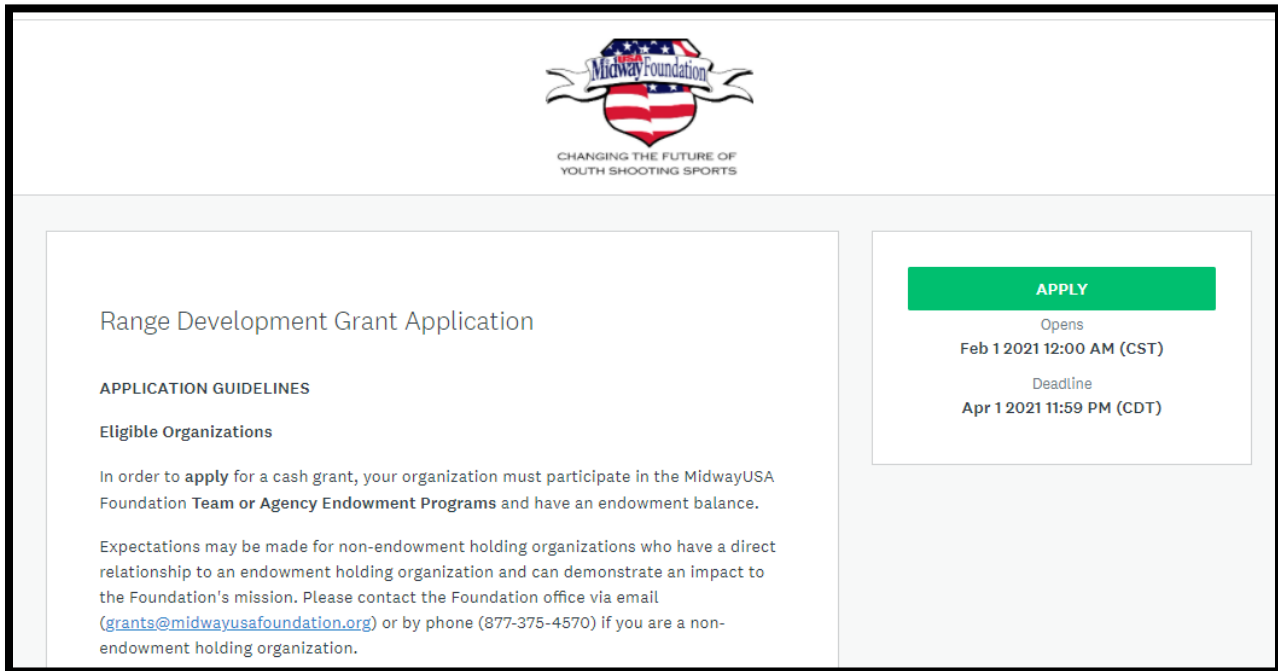
If your organization does not have any open applications, click on *View programs* to see the cash grant programs.
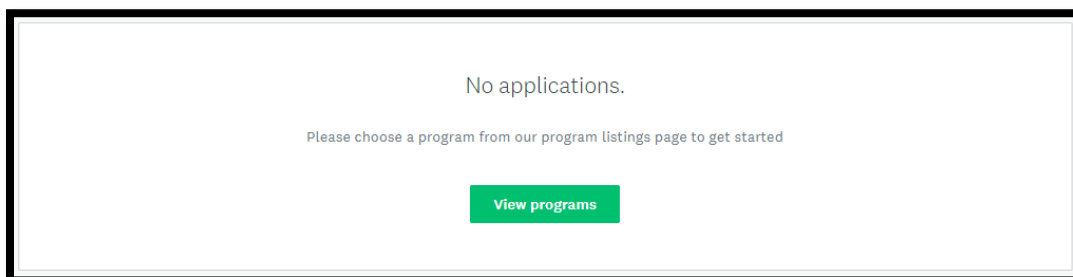
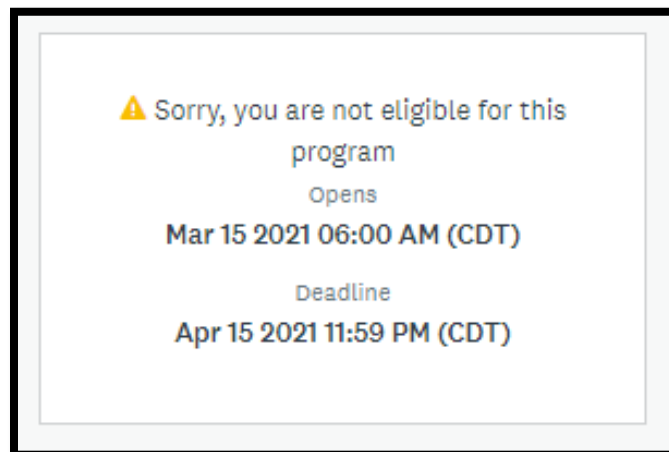Click *More* to view the program guidelines, open and deadline dates, and to start an application.

Click the *Apply* button to start an application.

If the *Apply* button is not available, the program is not yet open, the deadline has passed, or your organization is not eligible. If your organization is <u>not eligible</u> to apply, it will be noted above the open and deadline dates.
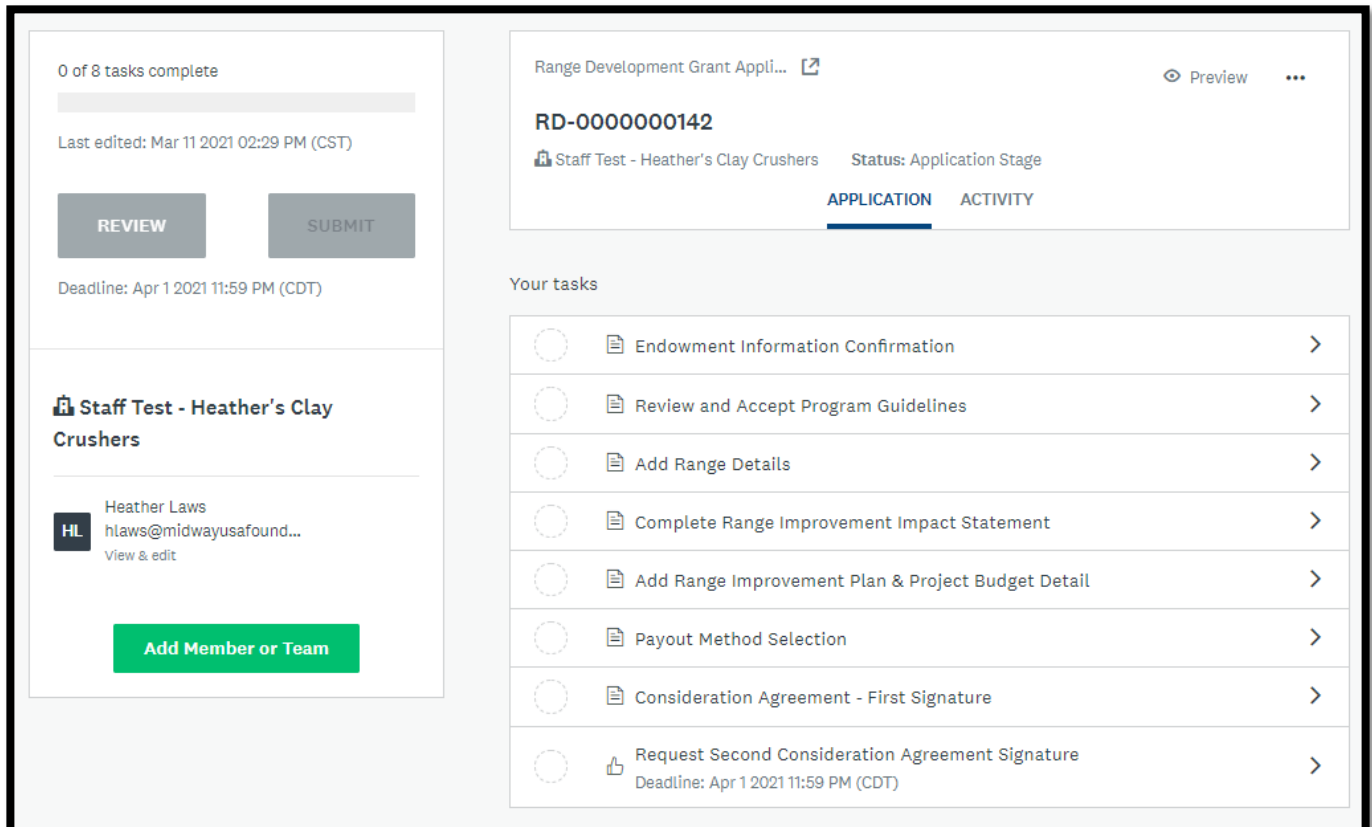

<u>IMPORTANT</u>: The individual user who starts the application, will default to be the *Owner* of the application.

Only the *Owner* of an application may submit the application. See the *Application Glossary* for definition.

Completing a Task

Each application has a defined number of tasks to complete. Each task is set-up to collect applicable information relating to your cash grant request. You may complete tasks in any order, but you may not submit your application until all tasks are complete.

Tasks completion is noted by the following:

1) Blank dashed circle = **not started**
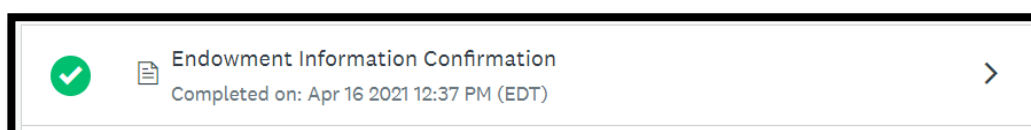
2) Green half circle = **started but incomplete**

3) Green circle with a check mark = **complete**

Once every question within a task has been completed, you are able to click the ***Mark As Complete*** button and the task will display a green circle with a check mark. You must mark all tasks as complete in order to submit your application. The ***Submit*** button will become available once all tasks are complete.

If you are not finished with your work, you may save your work by clicking ***Save & Continue Editing***. The system allows you to work at your own pace. You are able to save your work and come back at a later time to complete the application. By clicking ***Save & Continue Editing***, you may log out and return at your convenience to complete your application.

Editing a Completed Task

If a task is marked as complete but you need to make an edit, open the task, click on the ellipses in the upper right corner, and select *Edit*. This will reopen the task for editing; you will need to mark the task as complete when your edits are complete.
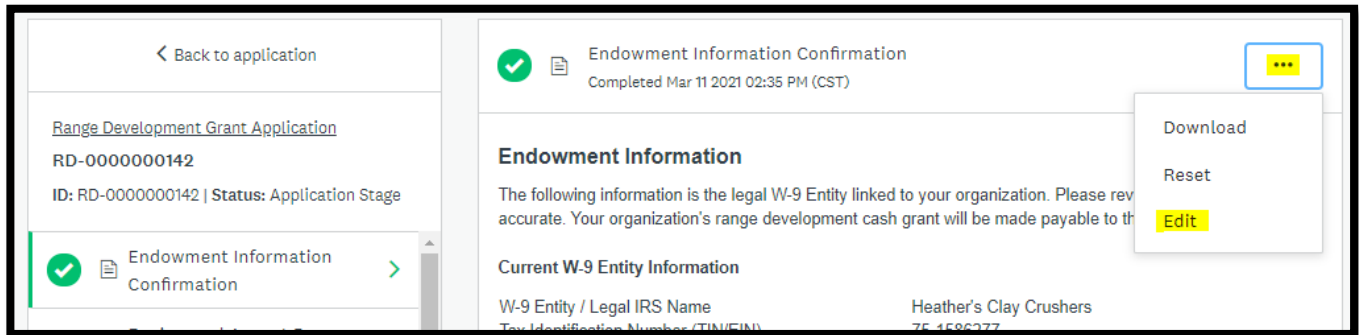
If you need to clear the entire task, open the task, click on the ellipses in the upper right corner, and select *Reset*. This will remove any saved work and mark the task as not started.

Gathering Signatures

All cash grants applications require **_two unique individual_** signatures from two different system users. For transparency, the signatories must be an active user within the system. Applications with incomplete, inaccurate, or conflicting signatures may result in the denial of your request.

Usually, the **_first signature_** is provided by the application **_Owner_**; or it may be provided by another profile member who has been added to the application.

There are two (2) methods for capturing the **_second signature_**. Each application provides guidance on how to determine the best method for capturing the required second signature.

First (1) method is the **_Member, Internal Assistance_** option; this option will allow a **_Member_** from your organization's profile to provide the second signature, as well as grant them access to assist with other application tasks; and has **two requirements**:
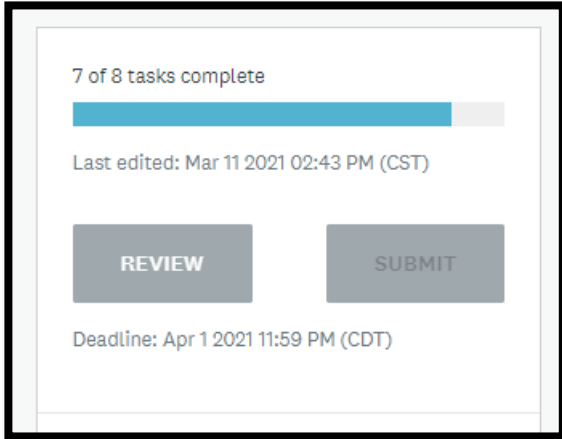
1) Individual must be an **existing member** on your organization's profile
   a. See **How to add a Member to my organization's profile** for details instructions
   b. To review current members of your profile, click **_Manage organization_** in the top right corner and select **_Members_**
2) Individual must be **added to the application**
   a. See **How to add a Member to my application** for detailed instructions
   b. This individual must login with their email and password to provide their signature

Second (2) method is the **_Non-Member, External Assistance_** option; this option utilizes the **_Recommender_** task and allows you to send a signature request to an individual who is not a member of your organization's profile. This individual's access will be limited to reviewing the application and providing the second signature on the Consideration Agreement.

Utilizing this option will automatically create a system user; and sends an email notice to the individual asking them to provide a signature on your application. Once the individual accepts your request, they will be prompted to create a password, if they have not used the system previously. See **How to request a second signature** for detailed instructions.

Submitting an Application

Once all application tasks have been marked as complete, the **Submit** button will become available. Only the **Owner** may submit a completed application. By clicking the **Submit** button, your application will be submitted for review. You will receive an email confirming your application's submission.
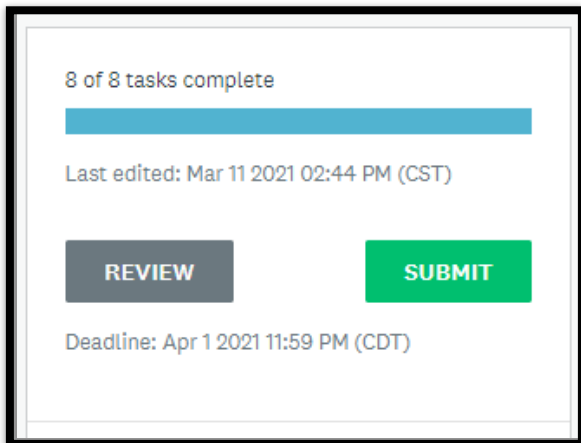

< 7 of 8 tasks complete, **Submit** button not available

< 8 of 8 tasks complete, **Submit** button is available
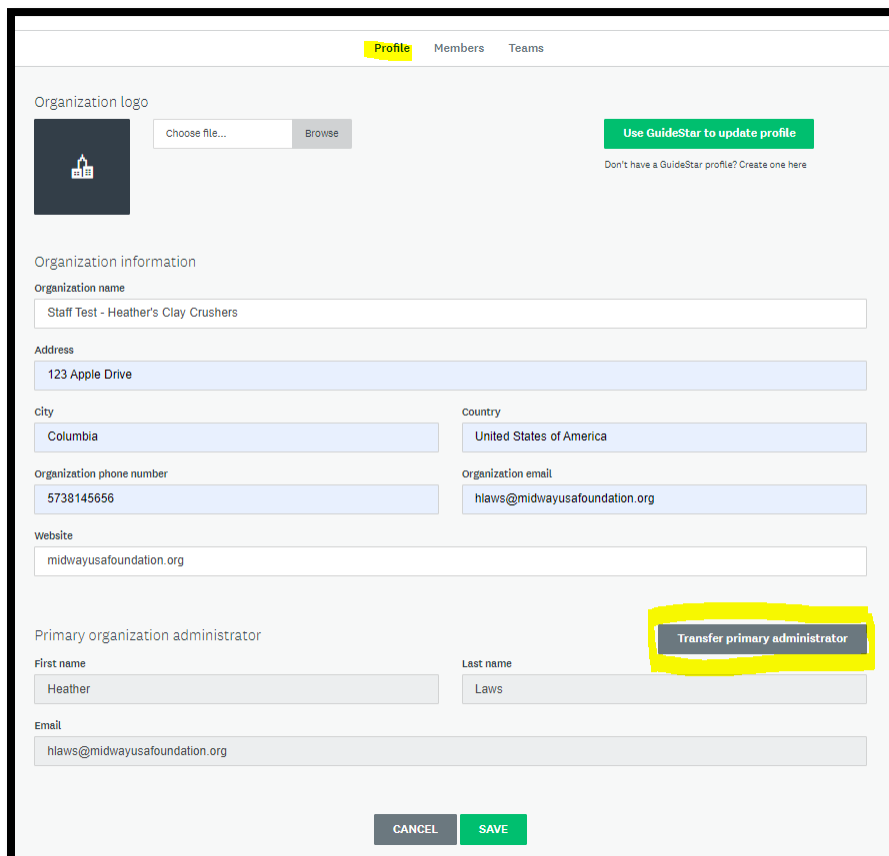
Organizational Profile Management

To view your organization's profile, click on *Manage organization* in the upper right corner.
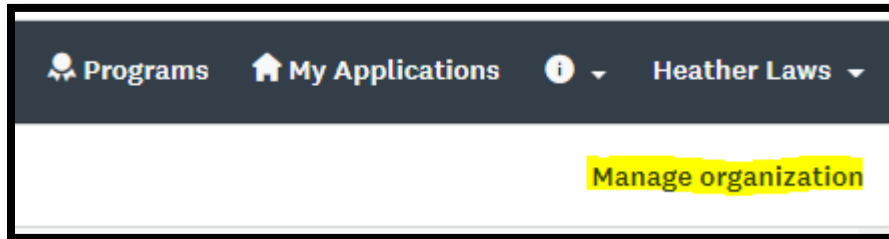
The *Profile* tab lists basic organizational information and the *Primary administrator*. The *Primary administrator* is the owner of the organization's profile. This user has full administrative control over members and applications.

If you need to transfer ownership of the primary administrator role, the new primary must first be listed as a *Member* of the organization's profile. See **How to change the Primary administrator of my organization's profile** under the detailed instructions section.
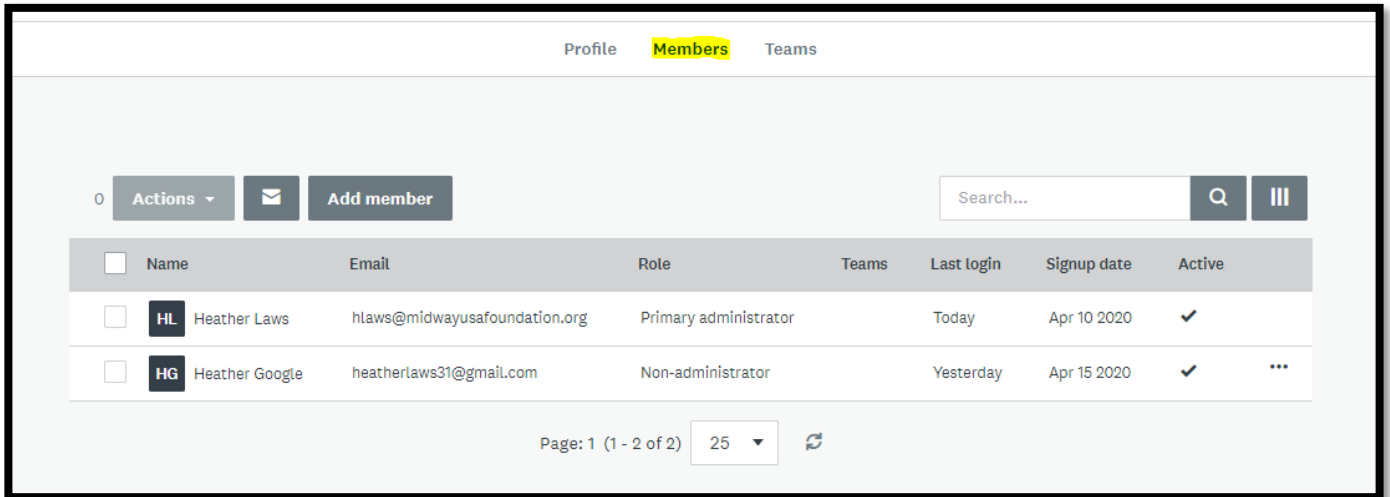
The *Members* tab lists the users linked to your organization's profile. The *Primary administrator,* or an *Administrator*, may add new *Members*, as well as manage user's roles and their access to the organization's profile. See the *User Glossary* for details on member roles and access.
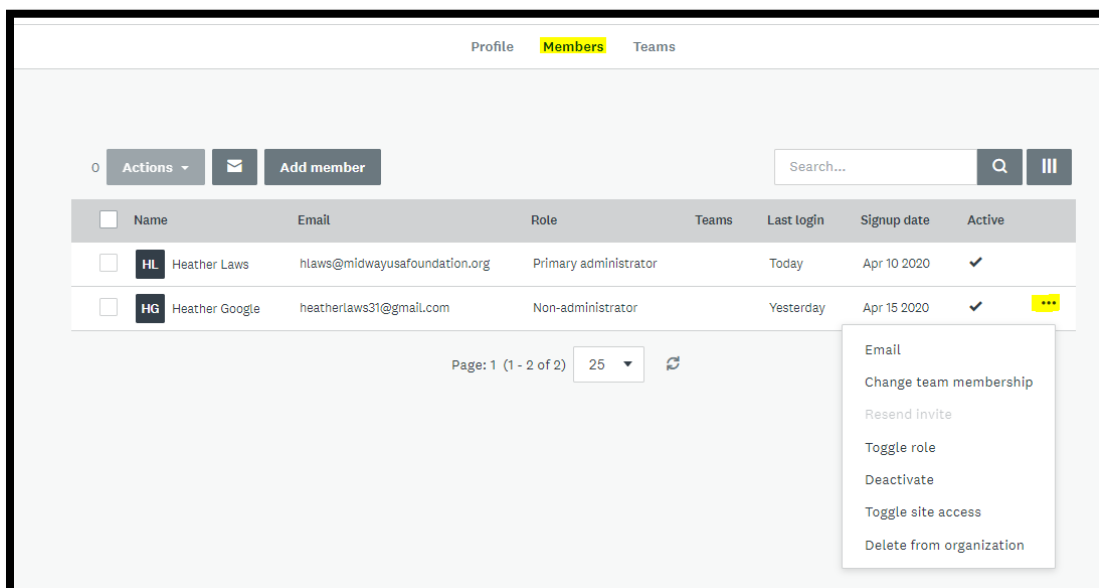
To edit an existing member's role, click on the ellipses next to the member's name and select the applicable option:

- *Toggle role* – change the member's role to either *non-administrator* or *administrator*
- *Deactivate* – disable a user's access to the profile
- *Toggle site access* – remove a user's access to the profile
- *Delete from organization* – remove a user from the profile

Adding a New Member (User) to My Organization's Profile

Navigate to the *Members* tab of the profile under *Manage organization;* click *Add member.* A screen will become available for you to enter the 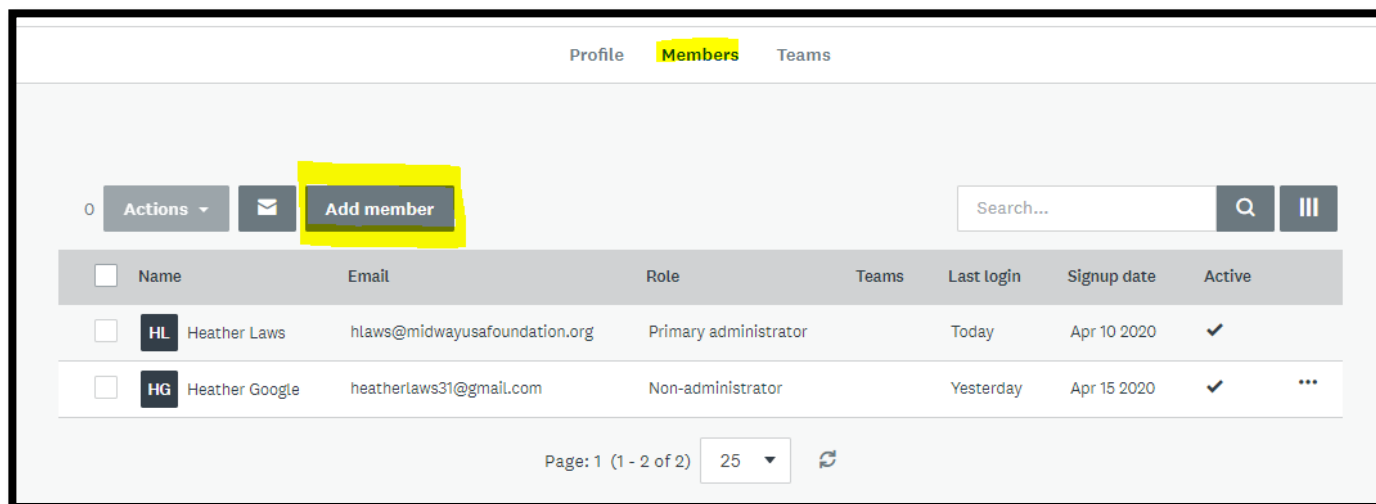new user's name and email address. See **How to add a Member to my organization's profile** under the detailed instructions section.

Adding a new *Member* will generate an invitation email to not only join the system, but also your organization's profile. New users must click the link within their invite email to confirm access and verify their email address. Using this link prompts the new user to create a password and completes the creation of their user profile and their addition as a *Member* to your organization's profile.

Adding a Member (User) to My Application

If you are the *Owner* of an application and you want assistance with completing application tasks <u>or</u> need to capture the second signature, you may add another profile member. Profile members added to an application become a *Collaborator* and receive an email notice indicating their newly added access to the application.
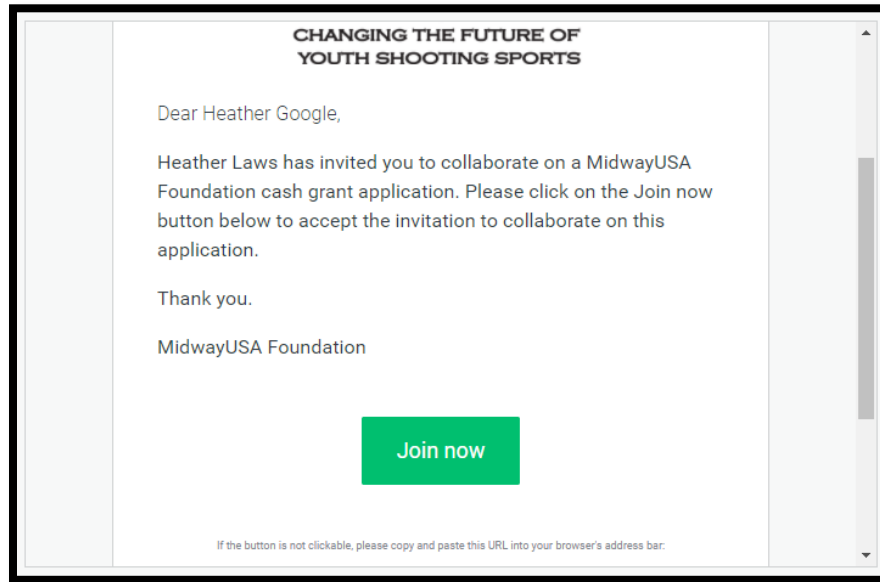
See **How to add a member to my application** under the detailed instructions section.

If you need to change the *Owner* of the application, open the application, click the ellipses next to the member's name, and select *Make owner*. This *Member* now will become the application owner and have the responsibility of submitting the application.
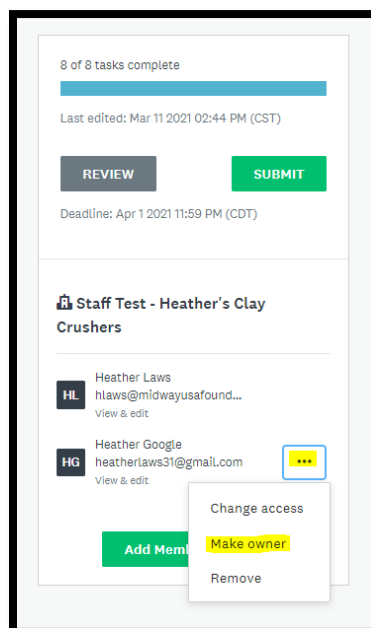
404 Errors

The grant system may alert you with a 404 error.

Below are common reasons for receiving a 404 error alert.

- When logging in:
    - Your access to the site may have been deactivated
    - You may not have been given the correct role or access when added to a profile
    - Two users are attempting to login on the same computer at the same time
- When viewing an application:
    - You are not the owner of the application or have not been given access to the application
    - You must be a primary administrator or an administrator to view an application started by another user
    - You must be listed on the application to view and/or edit tasks
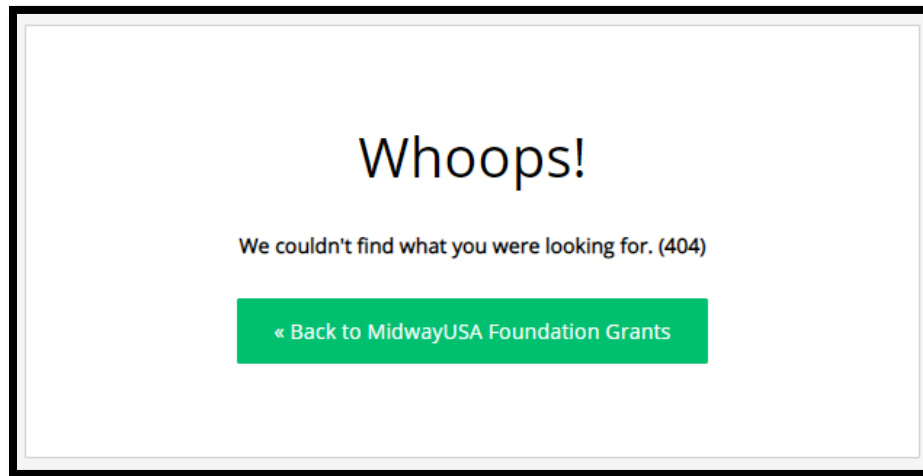- When switching between two organizational profiles:
    - Your access to the organization's profile may have been deactivated
    - You may not have been given the correct role or access when added to the profile

To resolve an error:

- First, clear your cache and browsing history
- Second, contact the *Primary administrator* of your organization's profile to confirm your user access
- Third, contact the Foundation for assistance; be sure to include as much detail as possible, including your *Endowment Name* and *Endowment ID*

FAQs

How do I know if my team or organization has access to the system?

- If your team or organization has received a cash grant in 2020 or <u>later</u>, your team or organization has access. You may contact the Foundation to confirm your team or organization's access and the *Primary administrator* for your organization's profile.

How do I know if I have user access to the system?

- If you have previously logged into the system, you have access. Once you have been granted access, it will remain intact until you are removed from the site. Removal from the site may occur if you are no longer active with the endowment holding organization.

How do I login to the system?

- Visit any one of our Cash Grant Program pages on our website. A *Login* button is available on each grant program page. You may also go directly to the login page utilizing the following URL: https://musaf.smapply.org/acc/l/

How do I know if my grant application was submitted?

- You may view the status of your grant application by logging in and viewing the application. The status of your application will be posted in the *Status* section of an open application.

How do I know if my grant application was approved?

- Notification of approval will be sent via email to the application owner. Applications are approved by the MidwayUSA Foundation Board of Directors or MidwayUSA Foundation staff. Your application will be marked as *Awarded* and you will subsequently be able to view the details of your cash grant award by logging in and viewing the application.

Where do I go to check on the status of my grant application?

- You may view the status of your cash grant application by logging in and viewing the application. The status of your application will be posted in the *Status* section.

How do I know if my team or organization is eligible to apply for a cash grant?

- The Foundation regularly sends out email communication to all eligible organizations prior to every program launch. All endowment contacts are included in the initial program launch email communication.

- You may also view your organization's *Eligible Programs* through the system by clicking on *Programs*. If your organization is eligible to apply, you will see the program listed.

CHANGING THE FUTURE OF YOUTH SHOOTING SPORTS

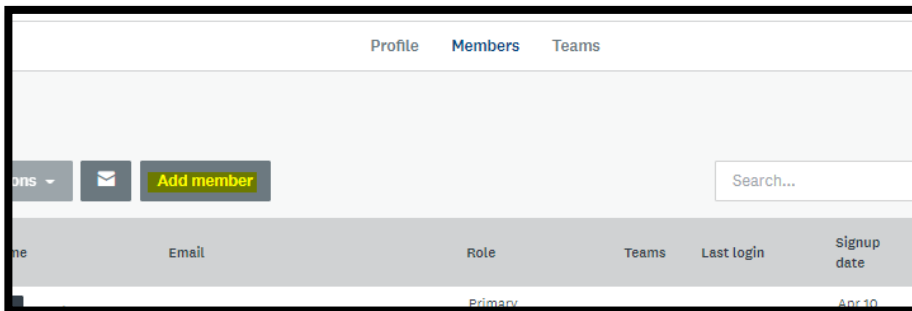## How to add a Member to my organization's profile

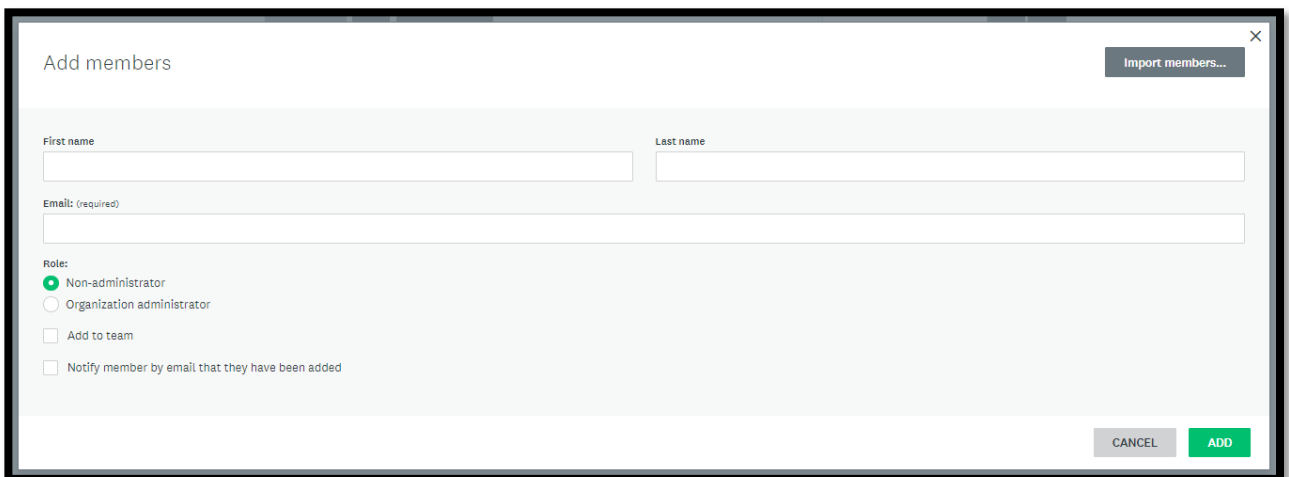*1.* Click on ***Manage organization*** (upper right corner)
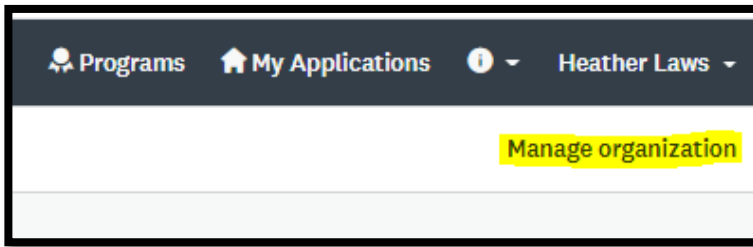
2. Click on ***Members*** at the top of the page
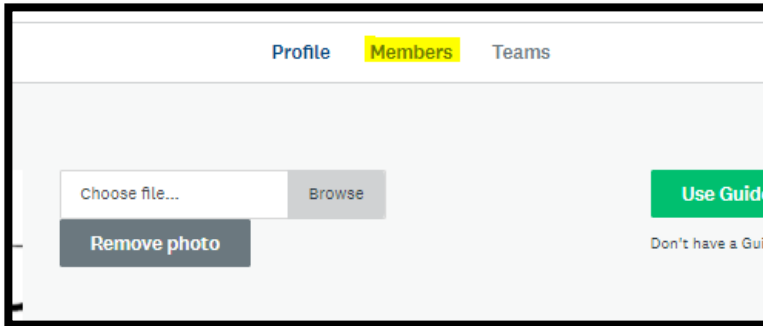
3. Click on ***Add member***

4. A window will appear with fields to add the new user's *First Name, Last Name, and Email Address*

5. Select/toggle the *Role* as *Non-administrator* or *Organization administrator*
   (see below for *role permissions and access descriptions*)

First name

Email: (required)

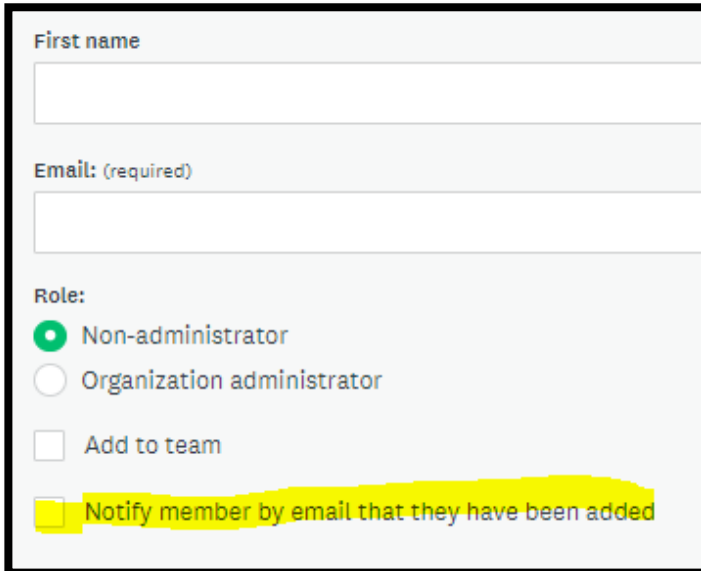| |
| --- |

Role:
- ● Non-administrator
- ○ Organization administrator

☐ Add to team

☐ Notify member by email that they have been added

Role Permissions and Access Descriptions

Member Type	Description
Primary Administrator	This is the organization member that initially creates the Organization 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 that organization.
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.
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.

6. Check ***Notify member by email that they have been added*** (this ensures an email notice is sent and starts the process of creating a new system user)

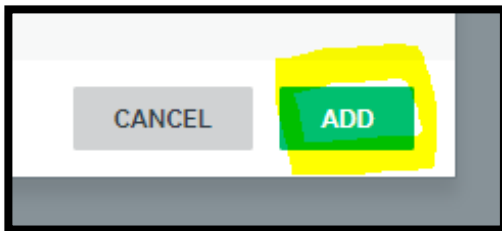First name

Email: (required)

Role:
- Non-administrator
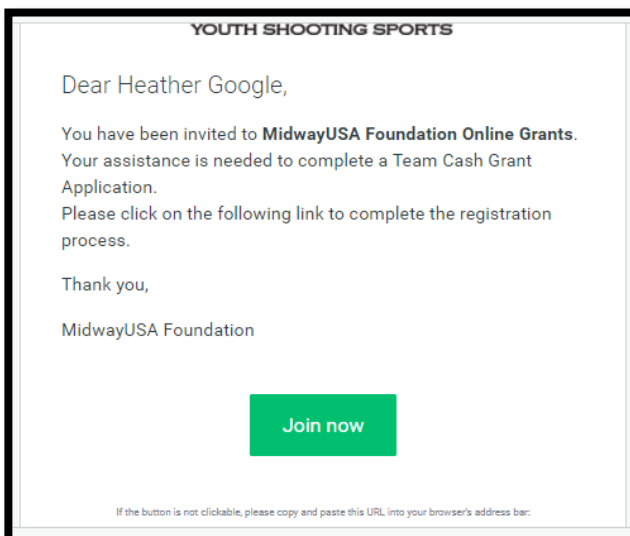- Organization administrator

- Add to team

- Notify member by email that they have been added

7. Click the ***Add*** button

CANCEL   ADD

8. An invitation email will be sent to the individual to join the system, as well as your organization's profile

YOUTH SHOOTING SPORTS

Dear Heather Google,

You have been invited to **MidwayUSA Foundation Online Grants**. Your assistance is needed to complete a Team Cash Grant Application.
Please click on the following link to complete the registration process.

Thank you,

MidwayUSA Foundation

Join now

If the button is not clickable, please copy and paste this URL into your browser's address bar:

9. Be sure to communicate with this new user to be on the lookout for their invitation email *(If it is not in their inbox, it may be in their spam/junk folder)*. New users <u>must</u> use the link within their invitation email to verify their email address, activate their user profile, and create a password.
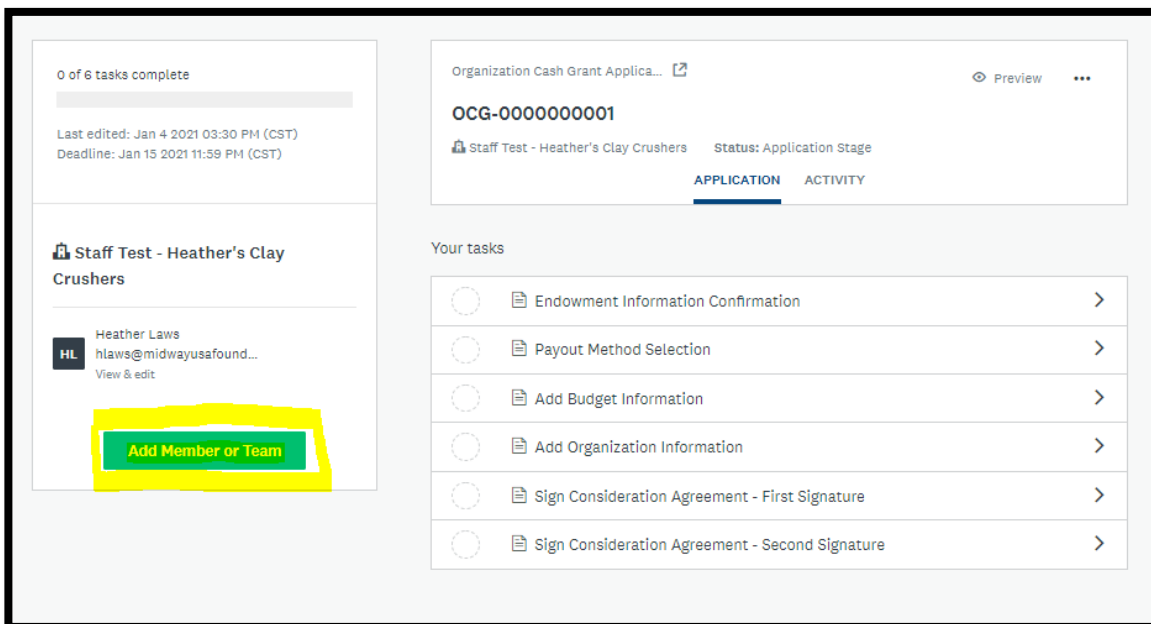
How to add a Member to my application
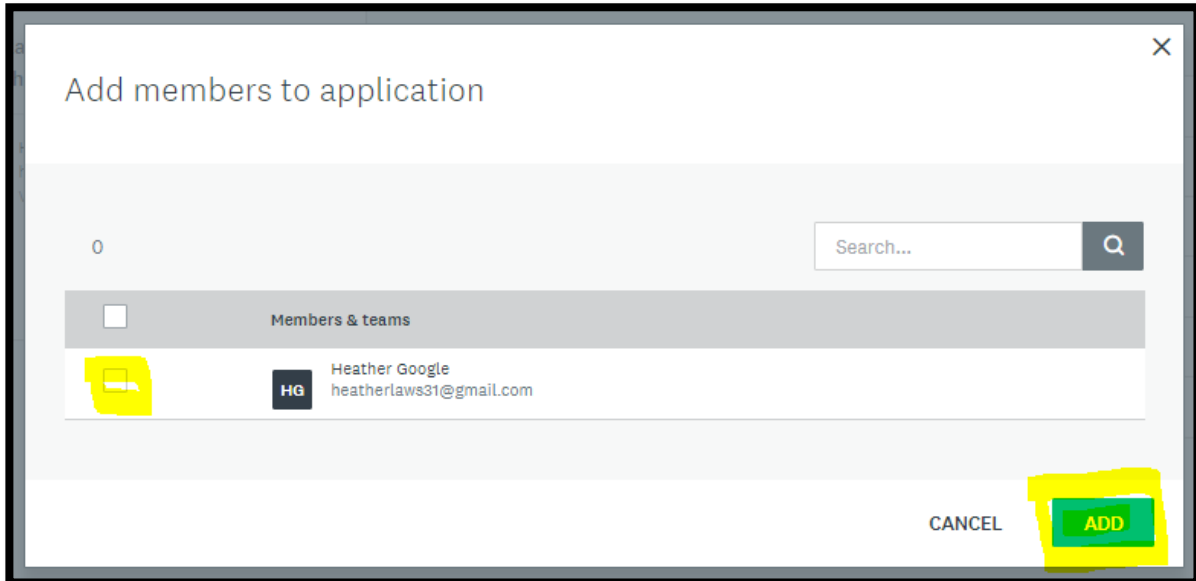
1. Click on *My Applications* (upper right corner)
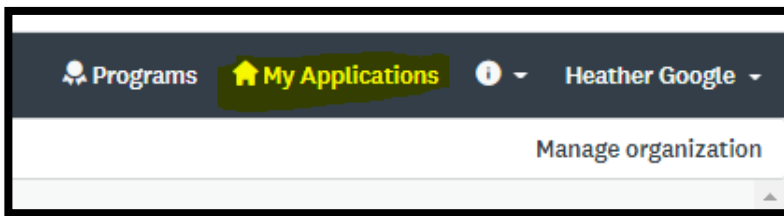
2. Click *Continue* or *View* to open the applicable application
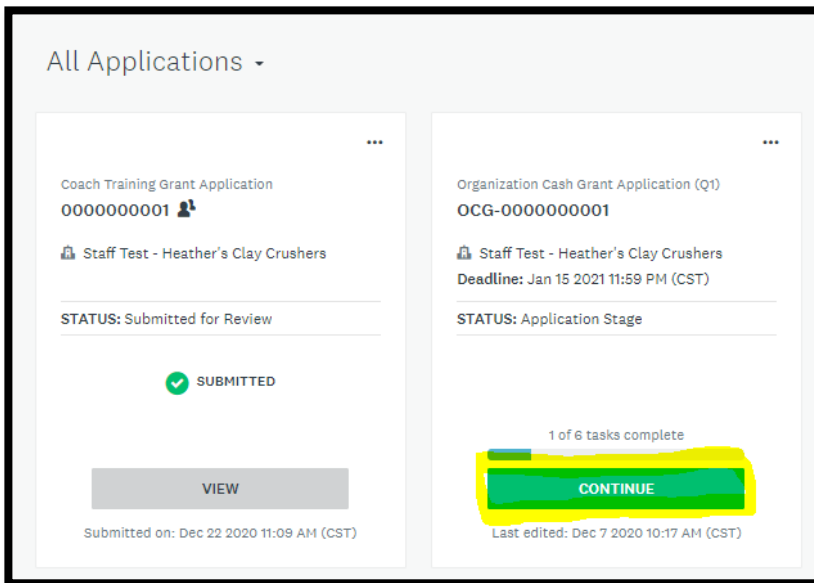
3. Click on *Add Member or Team* and a window will appear to select the applicable *Member*

4. Check the box next to the *Member's* name and click *Add*

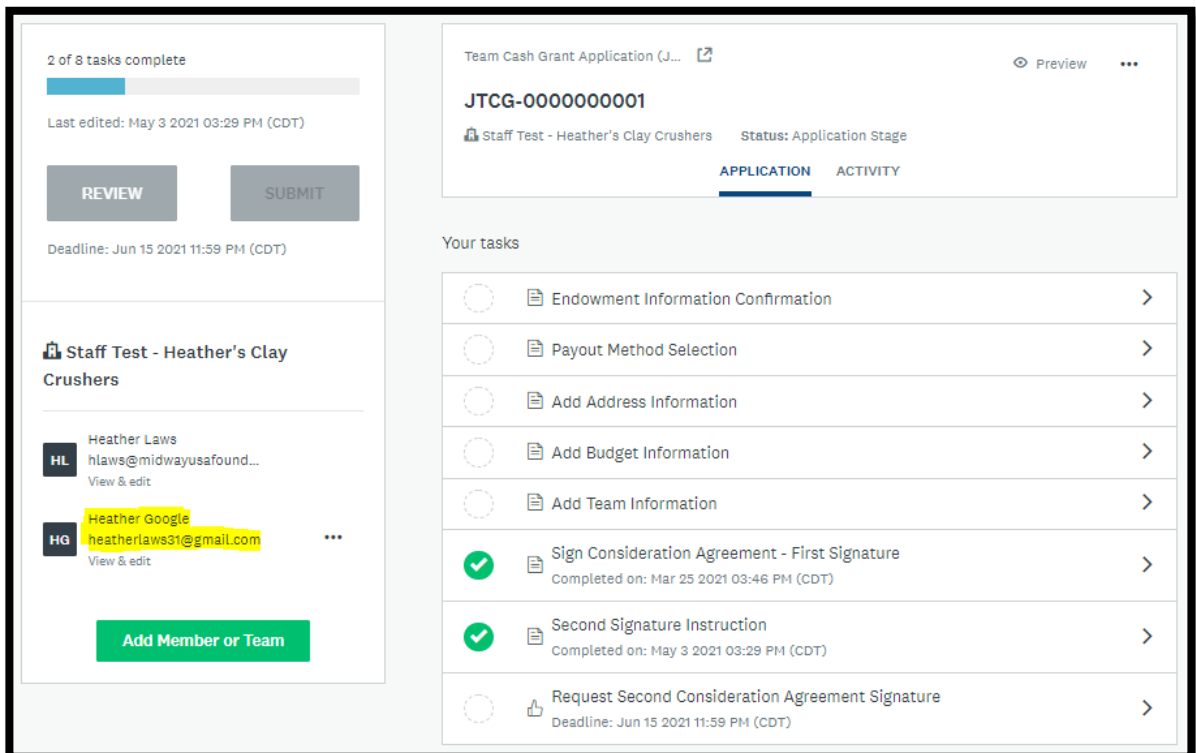5. You have successfully added another *Member* when they are listed under the application *Owner*

6. This *Member* will receive an email notice to collaborate on your application
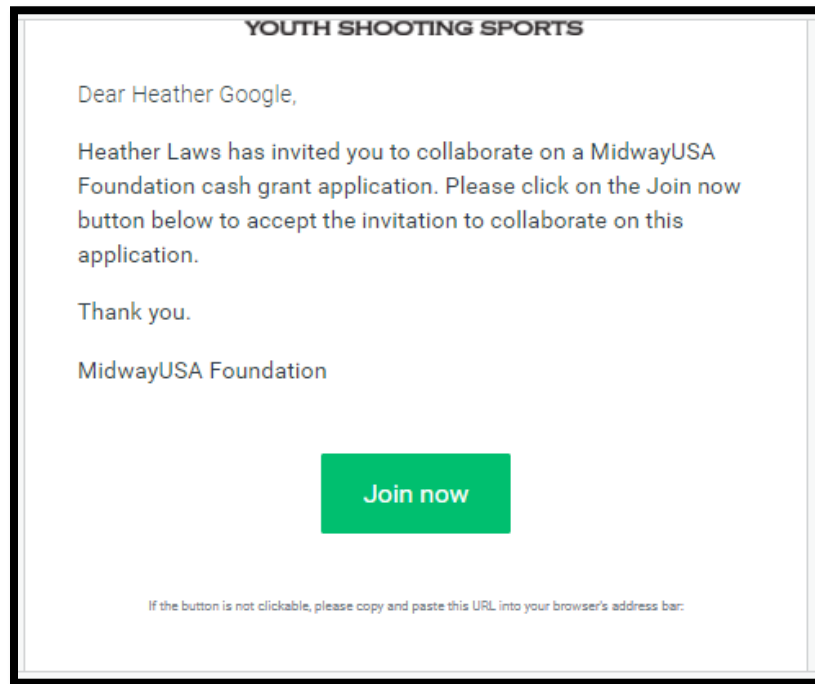
If this individual is <u>new to the system</u>, they will be prompted to create a password.

If they are an <u>existing system user</u>, they will be prompted to login with their previously created password.

If you need to make this member the ***Owner*** of the application, click on the ellipses and select ***Make owner.***
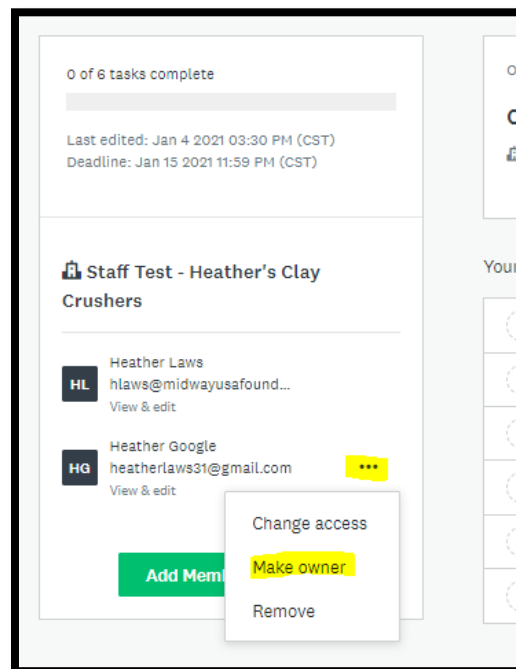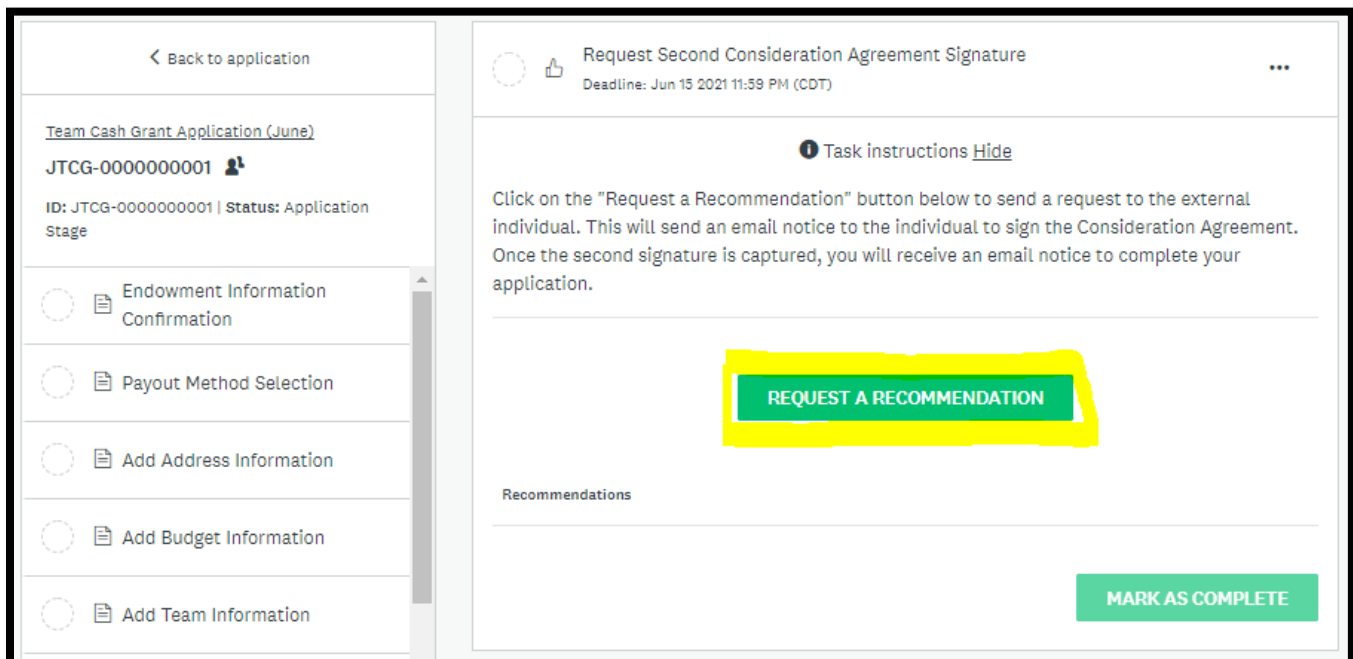
How to request a second signature

Below are detailed instructions on how to utilize the ***Non-Member, External Assistance*** option, the ***Recommender*** task, to gather your application's second signature
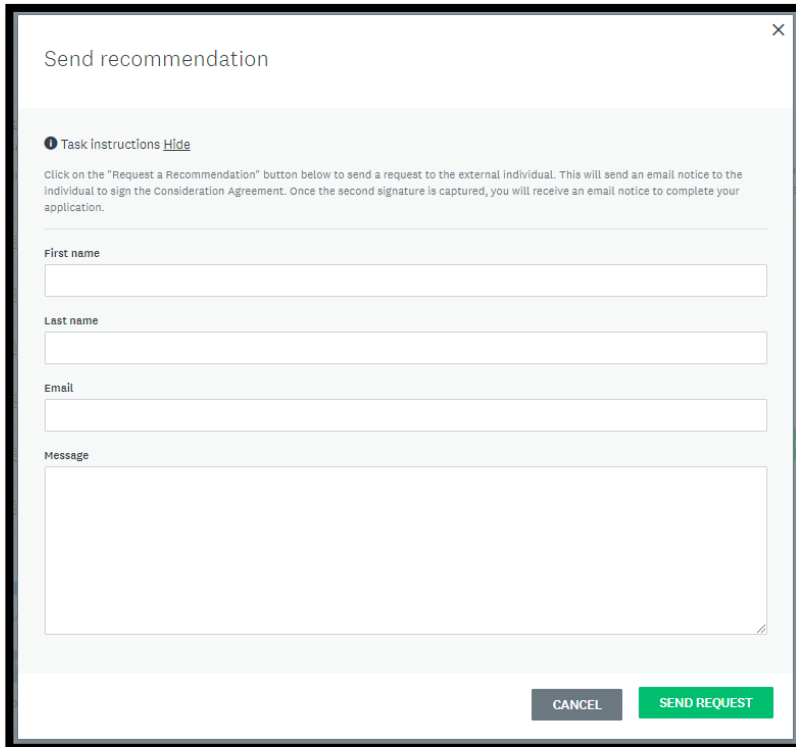
1. Open the ***Request Second Consideration Agreement Signature***
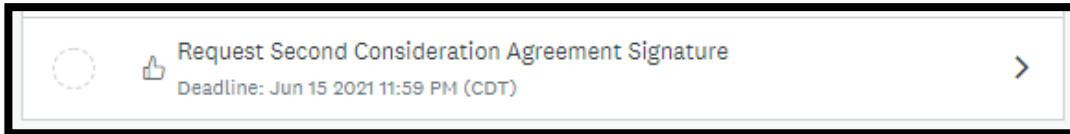
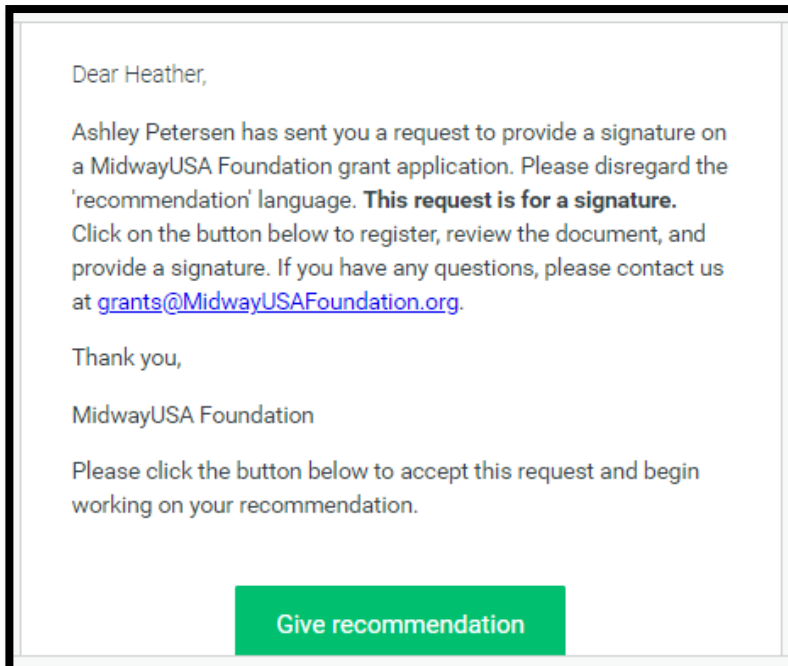2. Click on the ***Request A Recommendation*** button

3. A new screen will appear for you to type in the individual's *First name*, *Last name*, and *Email* address
Optional: You may include a personal message under the *Message* section

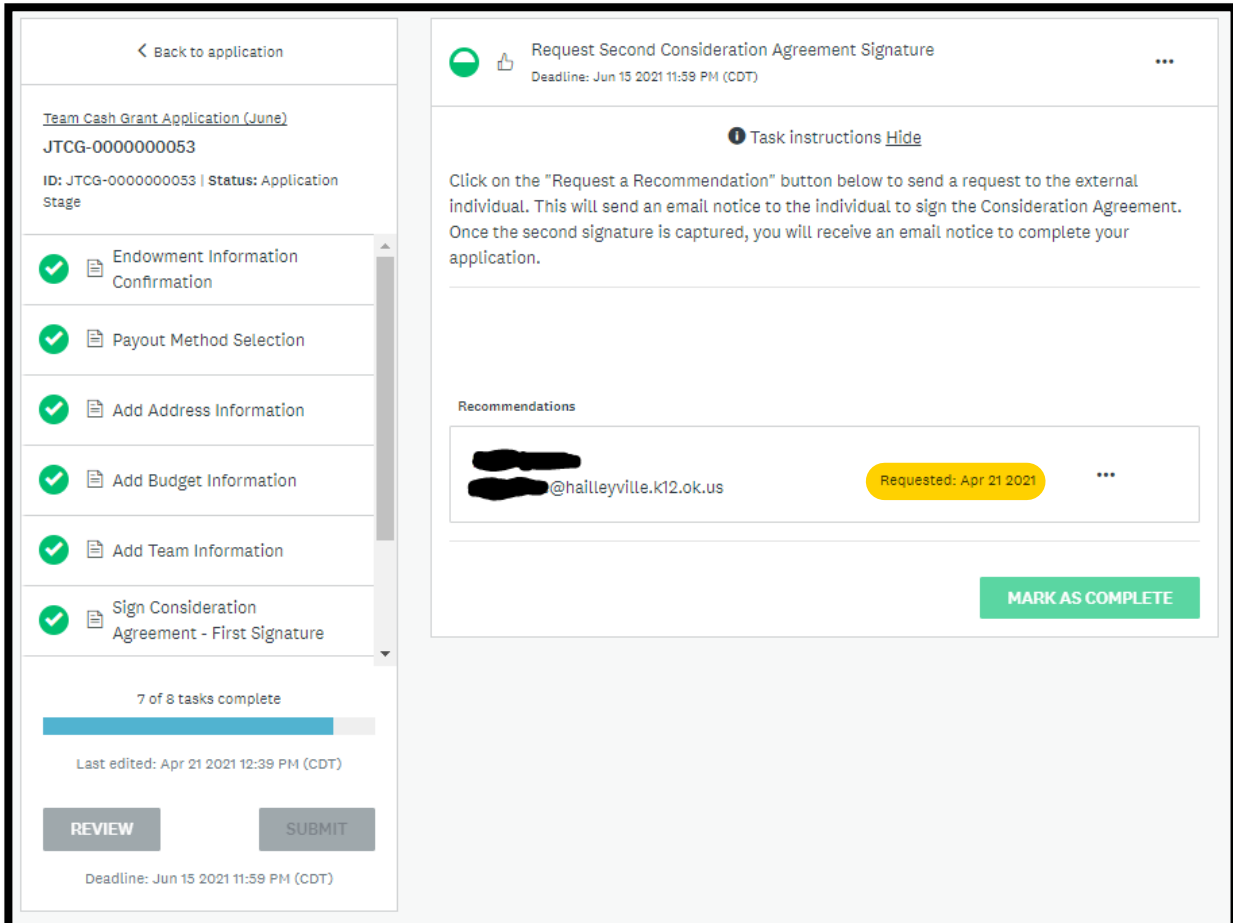4. Click *Send Request*
5. An email request for their signature will be sent to the email address provided

6. Once your request has been sent, you will see a requested date within the task

7. You will receive an email notice once the second signature has been captured

Dear Heather Laws,

Your requested signature has been received.

Please login to review your application and complete the following:

1. Mark *Request Second Consideration Agreement Signature* task as complete

2. Once all tasks are complete, submit the application by clicking the green *SUBMIT* button

Use the link below to login.

MidwayUSA Foundation Online Grants

Thank you,
MidwayUSA Foundation

8. Login to review the signature task; it will note with a received date
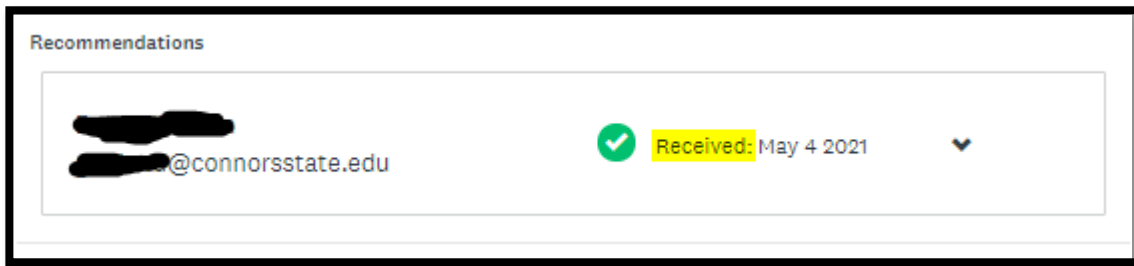
9. Mark this task as complete

10. Once all application tasks are complete, the *Submit* button will become available
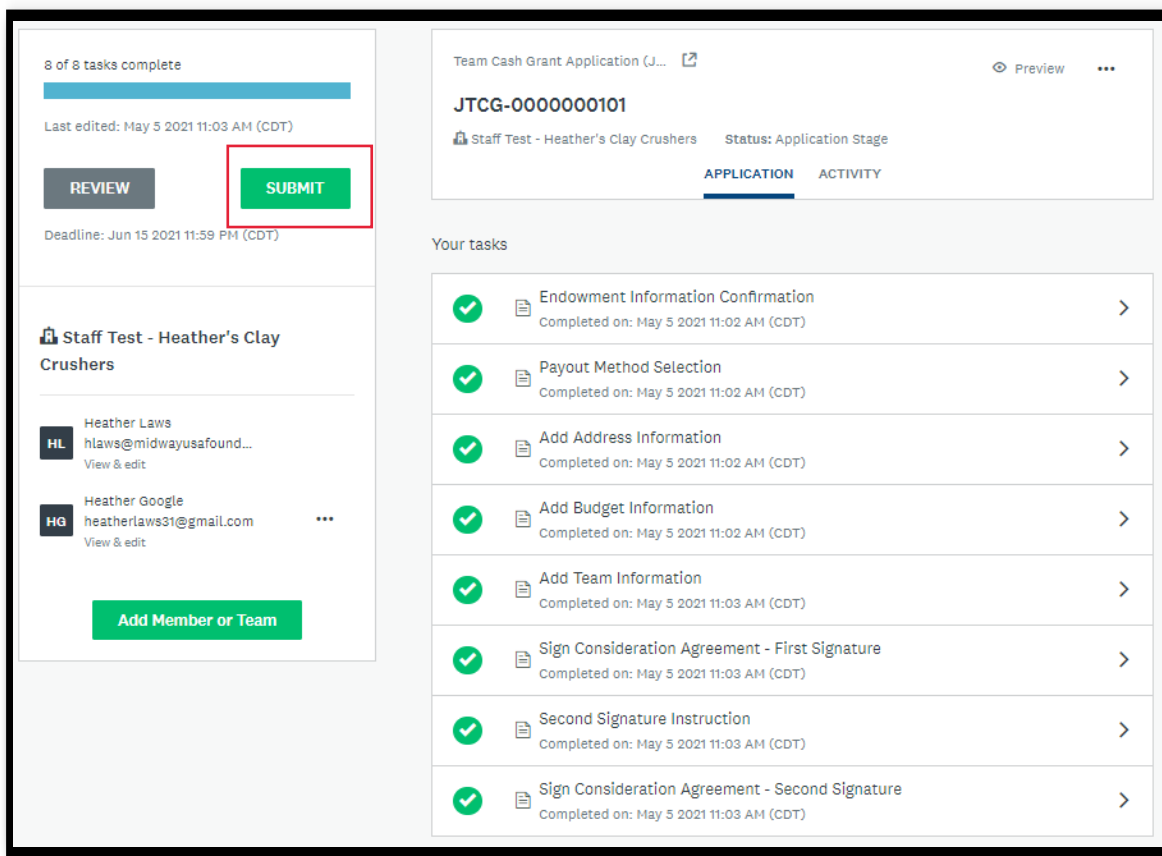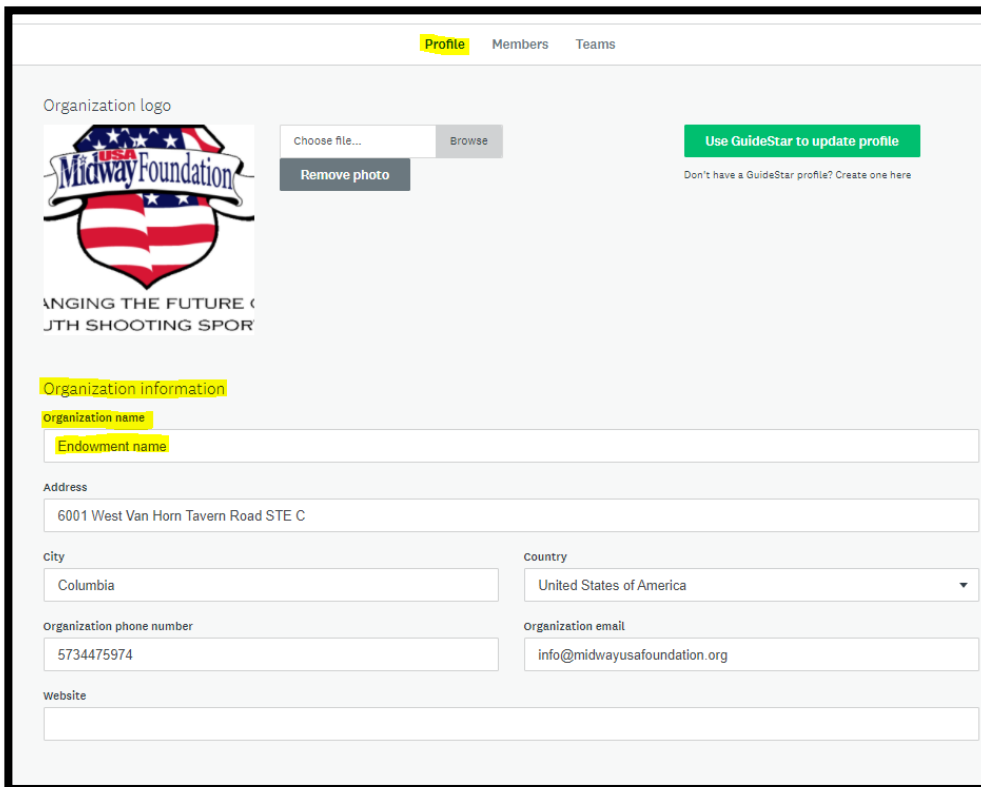
How to change the name of my organization's profile

1. Click on *Manage organization* (upper right corner)
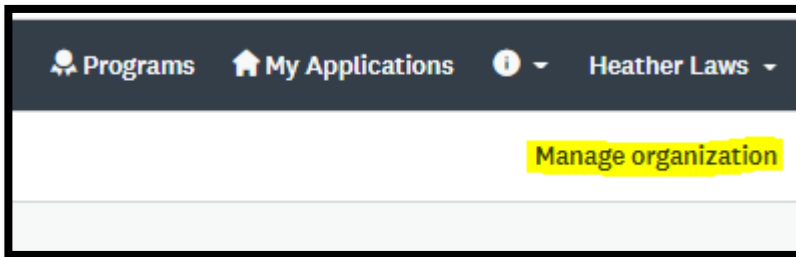
2. Edit the *Organization name* under the *Organziation information* section

3. Click *Save* at the bottom of the page

IMPORTANT: If you change the name of your endowment, you must update your organization's profile name to reflect your updated endowment name.

   Ideally, your organization's profile name will match your endowment name.

How to change my email address

1. Open your <u>user</u> profile by clicking on your name, then *My Account* (upper right corner)
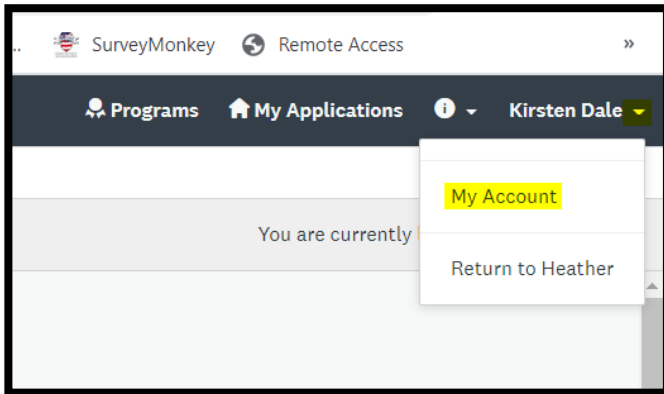
2. Change your email address under the *Email* section
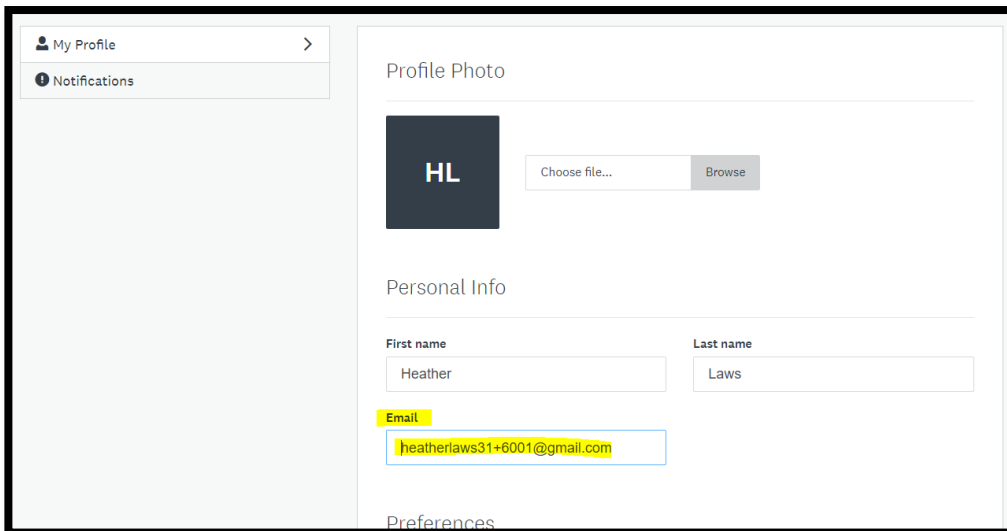
3. Click *Save.* The following note will appear under your email address, "*Check your email _____ to confirm your new email address. Until you confirm, notifications will continue to be sent to your current email address*".
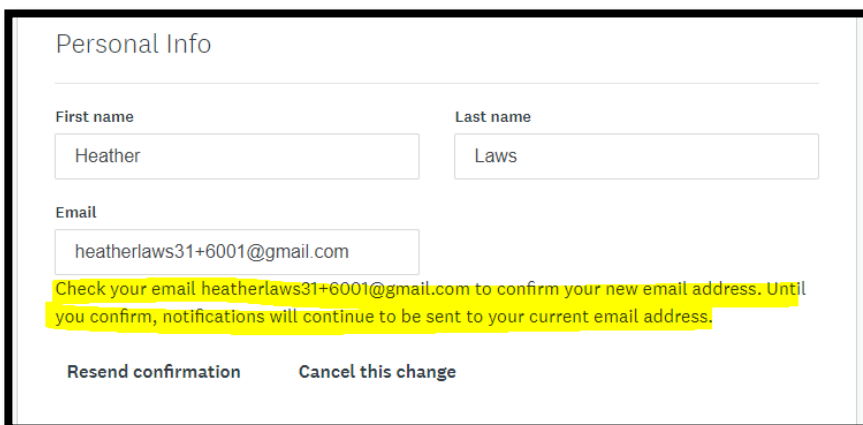
4. An email will be sent to the newly designated email address with a link to confirm the update, click the ***Change email address*** button
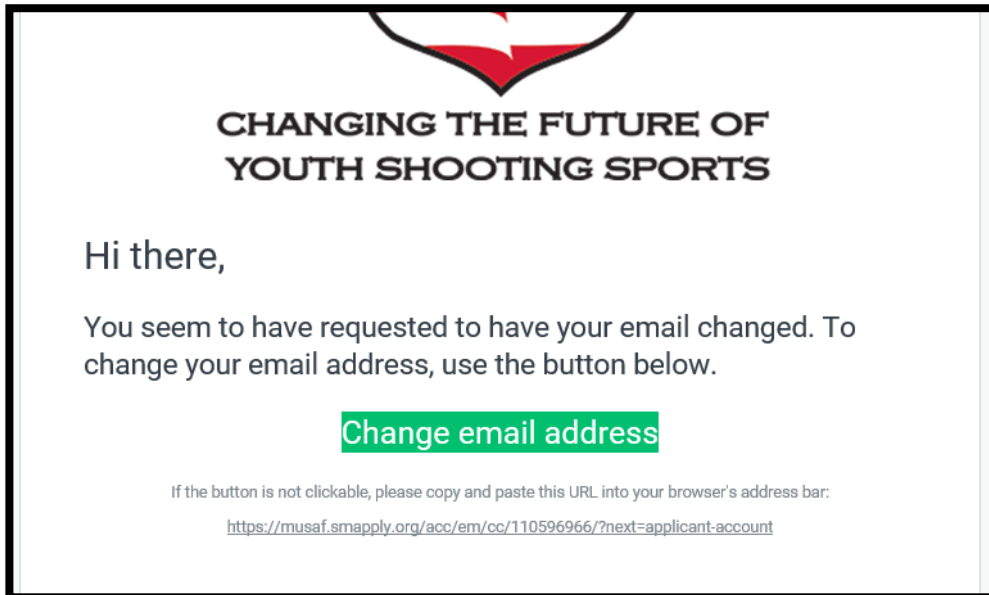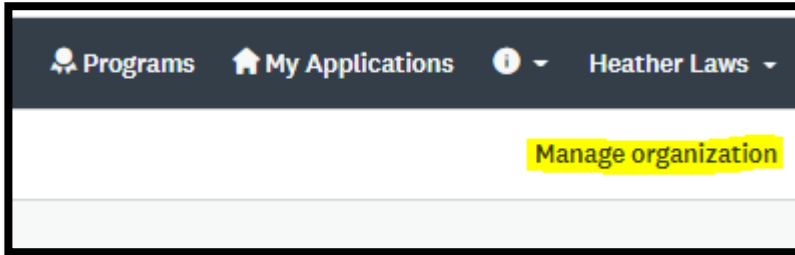
5. You will be taken to a login screen, ***use your original email address and pasword to login***
6. Once logged in, you will see a confirmation notice at the top
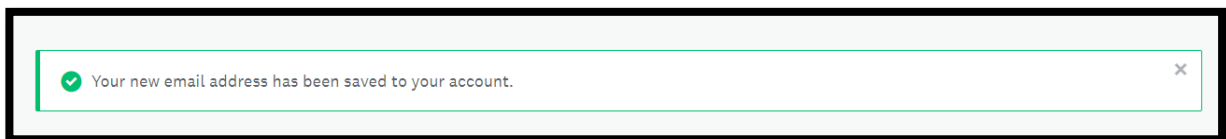
7. You will use your new email address for furtuer logins
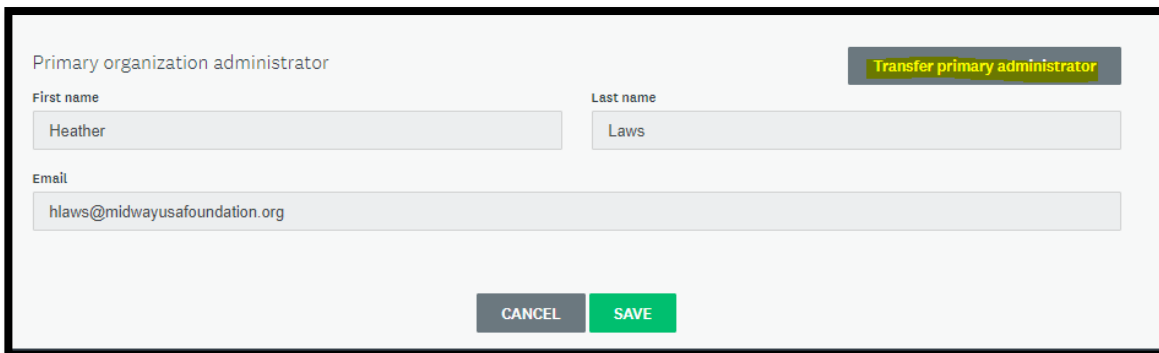
How to change the Primary administrator of my organization's profile

1. Click on **Manage organization** (upper right corner)
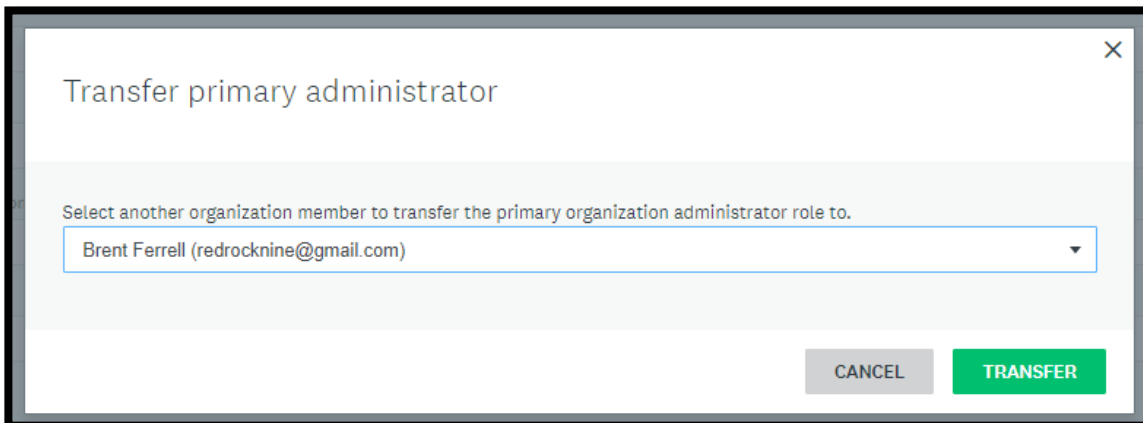
2. Click on the **Transfer primary administrator** button

3. A window will appear with a list of profile members (<u>note</u>: the new **Primary administrator** must be an existing *Member* of your organization's profile in order to transfer the profile ownership, see **How to add a Member to my organization's profile**).

4. Select the *Member* you want to receive the primary administrator role
5. Click **Transfer**

Application Glossary

➢ *All Programs* – cash grant applications

➢ *Eligible Programs* – qualified to start and submit a cash grant application

➢ *All Applications* – open applications in progress, submitted, awarded, or declined

➢ *Application Guidelines* – notes eligible organizations, minimum qualifications, program specifics/requirements, and program policy details

➢ *My Applications* – applications in progress, submitted, awarded, or declined

➢ *Owner* – user with ownership of an application. It defaults to the user that starts an application. Ownership is required to submit an application. Ownership may be transferred.

➢ *Collaborator* – user added to an application

➢ *Tasks* – application section with questions to collect applicant information

➢ *Mark As Complete* – records a task as finished when all task questions have been answered. You may save your work and can complete the task later by clicking *Save and Continue Editing*. All tasks must be marked as complete in order to submit your application.

User Glossary

➢ **User Profile** – overview of the user's role(s), applications, and preferences

    o User roles:

        ▪ *Applicant* role – view, start, and submit applications

        ▪ *Recommender* role – provide a second signature on an application

➢ **Organizational Profile** – represents one endowment and its basic information

    o *Manage organization* – manage users of an organizational profile

    o *Members* – users with access to the organizational profile

    o Member roles:

        ▪ *Primary administrator* – owner of the organization's profile. This member will have full administrative control over the organization's members and applications. This member can transfer ownership of the organization and may edit and remove members of the organization at any time. Also referred to as the Primary Grant Contact by MidwayUSA Foundation staff.

        ▪ *Administrator* – has 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 and inactivate other Administrators.

        ▪ *Non-administrator* – able to edit applications on behalf of the organization but will not have access to manage the organization's profile and members. They cannot start or submit applications for an organization.