GOAPPLY USER GUIDE

A GUIDE FOR GOAPPLY VERSION 2 USERS (APPLICANTS)

TABLE OF CONTENTS

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 an application.

First, a brief overview of how applications are set up in GOapply. 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, the appearance GOapply or any related emails may be different in your experience due to formatting and branding, however the functionality remains the same.

GETTING STARTED

You will need to either create your account or migrate an old account. GOapply underwent major updates; therefore, if you used GOapply to submit an application in 2020 or 2021, you will need to migrate your account to GOapply version 2.0.
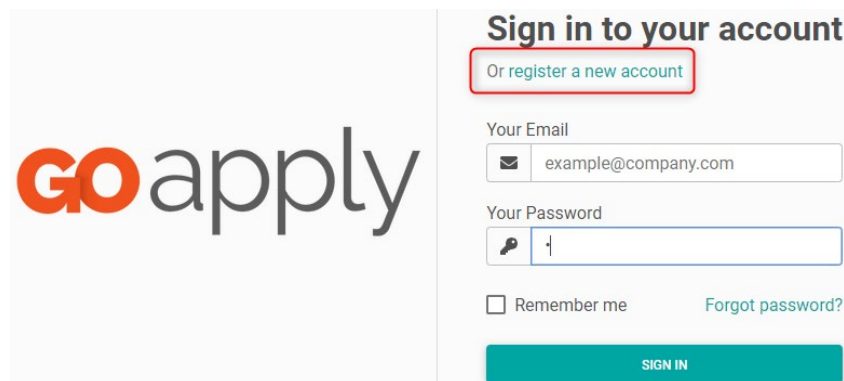
MIGRATE YOUR ACCOUNT

Your Grantmaker will supply you with a link to migrate your account. Input your email address and password. If your password is fewer than 10 characters, you will need to update it.

REGISTER

If this is your first time using GOapply, you'll need to register your account. You will have the option of registering as an individual or an organization.

AS AN INDIVIDUAL

Access the link provided to you by your Grantmaker. Click the link to register a new account

You'll be asked to register as an Individual or an Organization. Choose Individual.

GOapply allows for two different types of accounts – individuals and organizations. If you are applying for a scholarship or award (something that is for you or your work as an individual), select Individual applicant. If you are applying on behalf of an organization, nonprofit, or other group, select Organization applicant.

Fill in the form with your information. The email address you enter will be what you use to log in. Click Register. If your registration processed successfully, you'll see confirmation on the screen.

Next, **verify your email**. You should have a verification link in your inbox. If you don't see the email, check your Spam folder. If it goes to Spam, you need to classify it as Not Spam before you can click the link.
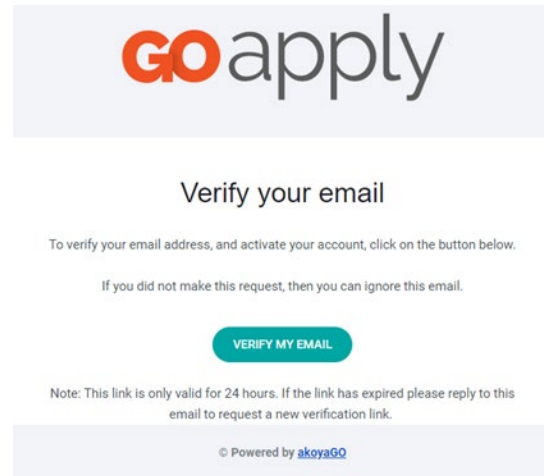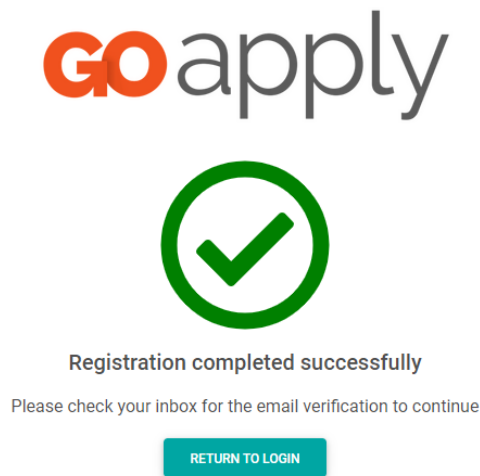
AS AN ORGANIZATION

Click register a new account on the log in screen and select Organization. You will then need to choose your country and apply either with a Tax ID or Business Number or through manual data entry.

We'll walk through each option below.

IN THE UNITED STATES

Choose United States as your Region.

WITH TAX ID

Enter your Tax ID then Search. If you don't know your Tax ID, click on the US IRS Tax Exempt Organization Search Tool to find it. After inputting your Tax ID, GOapply will search for your organization then ask you to confirm that it is correct on the next screen. If your organization is correctly displayed, click Select. Or you could Search Again or click Skip, manually enter.

Organizations matching: 37-1235999   Search again   Skip, manually enter

American Association of University Women

📍 Argenta, IL 62521

🏷 This organization is a 501(c)(4) Public Charity

Select

You'll then be taken to your Organization Profile. Your organization's information will autofill, but you'll need to enter your contact information. The email address you enter will be what you use to log in. Click Register.

From there, your Grantmaker will need to approve your registration. You will be notified via email when you have access to GOapply.

MANUAL ENTRY

If you choose to register manually, you'll be taken directly to your organization profile. Fill in the form with your organization's information and your contact information. The email address you enter will be what you use to log in. Click Register. Your Grantmaker will need to approve your registration. You will be notified via email when you have access to GOapply.

IN CANADA

Choose Canada as your Region.

WITH BUSINESS NUMBER

Enter your Business Number then Search. If you don't know your Business Number, click on the Canada List of Charities – basic search tool to find it. After inputting your Business Number, GOapply will search for your organization then ask you to confirm that it is correct on the next screen. If your organization is correctly displayed, click Select. Or you could Search Again or click Skip, manually enter.

Organizations matching: 771824711RR0001   Search again   Skip, manually enter

life from water canada

📍 3139 VEITH ST
HALIFAX, NS B3K3G9

🏷 Charitable organization

Select

You'll then be taken to your Organization Profile. Your organization's information will autofill, but you'll need to enter your contact information. The email address you enter will be what you use to log in. Click Register.

From there, your Grantmaker will need to approve your registration. You will be notified via email when you have access to GOapply.

MANUAL ENTRY

If you choose to register manually, you'll be taken directly to your organization profile. Fill in the form with your organization's information and your contact information. The email address you enter will be what you use to log in. Click Register. Your Grantmaker will need to approve your registration. You will be notified via email when you have access to GOapply.

PASSWORD ASSISTANCE

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

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.

DASHBOARDS

Once you are approved and logged into GOapply, you'll see two pages, Submissions and Opportunities. Organizational applicants will see a third page for their Organizational Profile.
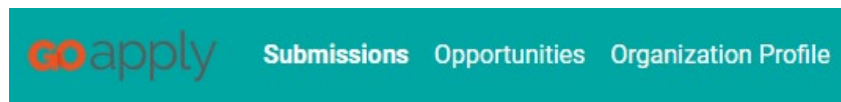
Submissions: The Submissions dashboard shows which applications you have in progress and allows you to view your submitted applications.
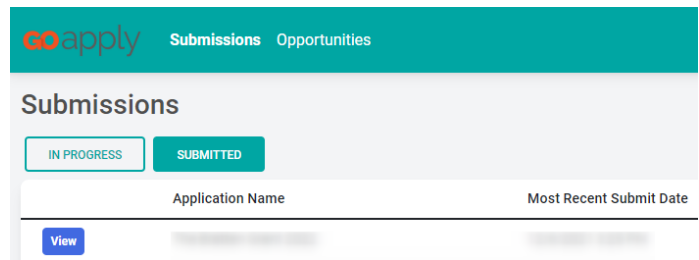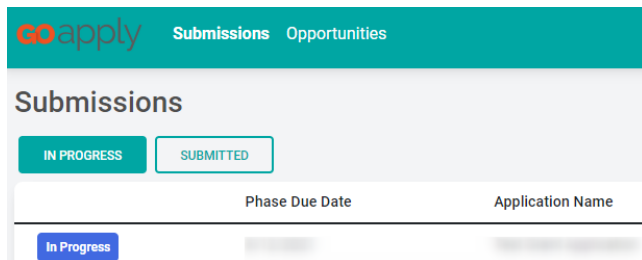

- - In Progress: Click In Progress to continue working on the application
- - Submitted: Click View to view your submitted application

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.

Messages: If your Grantmaker sends you a message through GOapply, a red number will appear in the message bubble in the top right corner of the screen. Click there to view your messages.
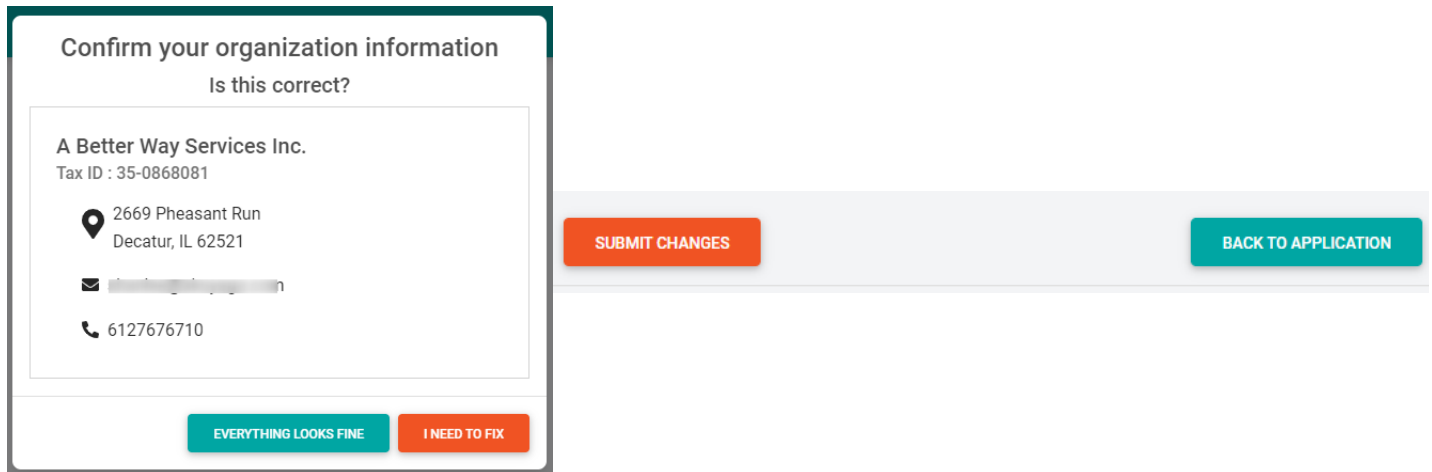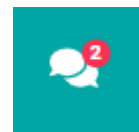

COMPLETING APPLICATIONS

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

The application homepage is where you can find the due date, a summary and a brief description, and the contact for that application. If you need assistance with the application, please reach out to the application contact.

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 if needed. If anything is missing or inaccurate, click I Need To Fix, edit information, and click Submit Changes. After your changes are saved, click Back To Application to continue the application.

On each page, you can either save a draft or continue without saving. Drafts will appear in your In-Progress dashboard. When you're finished with the phase, click Submit.

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 that you can finish from your In-Progress dashboard.
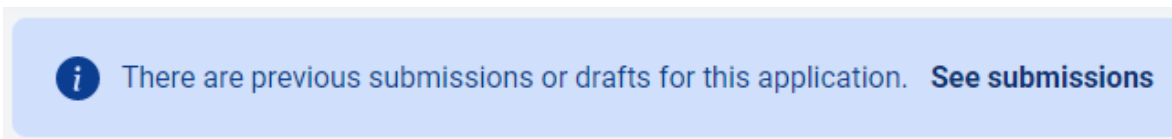
Advancing to the next phase: When the next phase is available, it will appear in your In-Progress dashboard. If you'd like to reference information you submitted in the previous phase, look in Submissions. You'll complete each phase as it becomes available, with the option to save a draft on each page.

Submitting: You can view all your submitted phases in your Submissions dashboard. Changes to an application cannot be made after submitting.

If you have any questions, please contact your Grantmaker.