

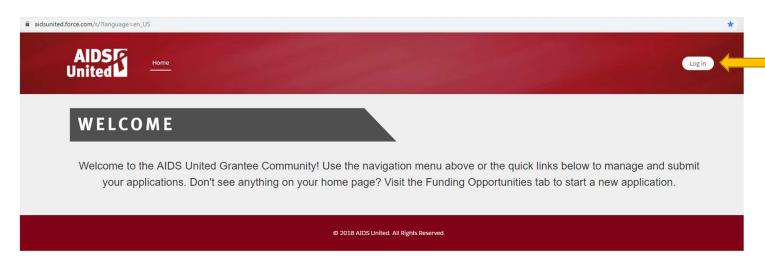
# Navigating the AIDS United Grantee Community Portal iFORWARD Year 2, 2022-2023 Full Proposal

Note: When accessing the Grantee Community, do not use Internet Explorer or Microsoft Edge. Please use only Chrome, Firefox, or Safari.

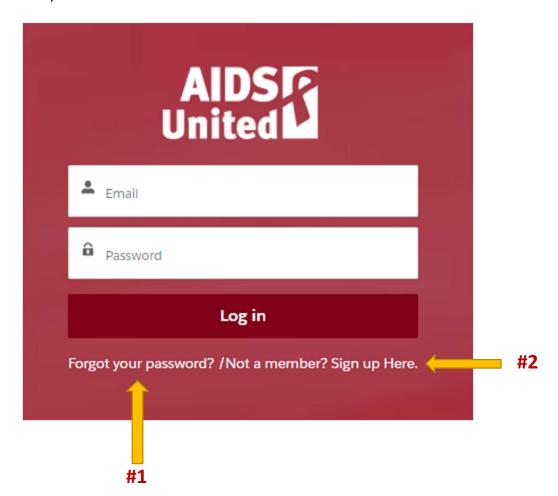
Also, a best practice for all online forms is to write and <u>save all your responses offline</u> in a Microsoft Word document or an equivalent so that, should you accidentally lose your work when completing the application form itself, you won't need to create your answers again. Working in a word processing program also allows you to monitor your character, word, or page count so you don't go over the maximum allowed by the RFP, if there is a specified limit. Please follow this best practice when applying for AIDS United grants!

Finally, note that the screen shots in this document show only the most relevant parts of the screen. So don't worry if you see things that aren't pictured below.

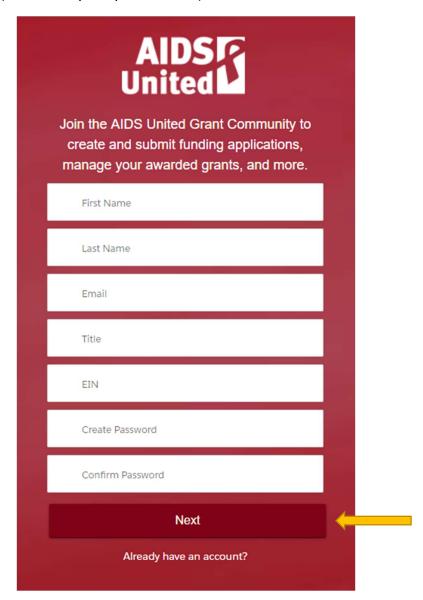
- 1. Go to <a href="https://aidsunited.force.com">https://aidsunited.force.com</a>.
- 2. Sign in by clicking the "Log in" button on the upper-right corner of the screen.



- a. If you have an account, enter your email address and password. Then click the "Log in" button.
- b. Note the "Forgot your password?" link below the "Log in" button (arrow #1).
- c. If you do not have an account, click "Not a member? Sign up Here." (arrow #2).

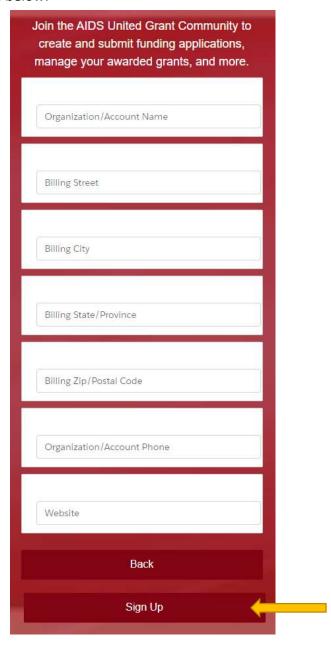


- i. If you're setting up an account for the first time, enter the required information.
- ii. When you've entered all that information, click the "Next" button (indicated by the yellow arrow).

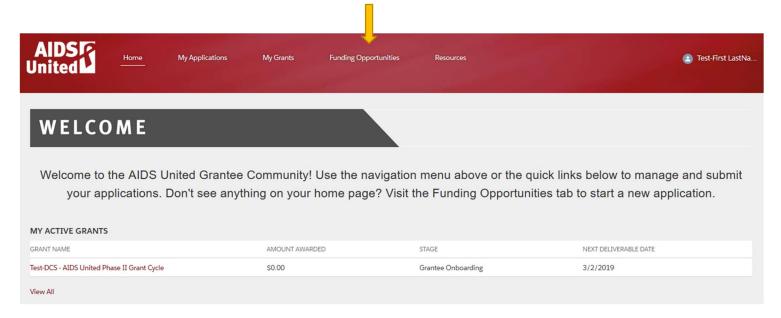


iii. On the second account creation screen, enter your organization's contact information.

iv. When you've entered all of that information, click the "Sign Up" button below.



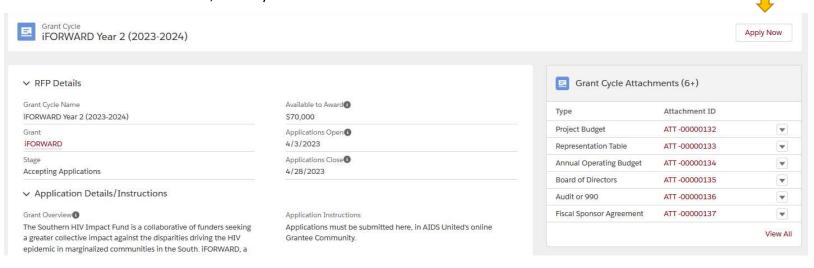
3. Once you are logged in, click on the Funding Opportunities tab at the top of the screen.



4. In Funding Opportunities, you'll see the iFORWARD grant cycle name.

OPEN FUNDING OPPORTUNITIES			
Grant Cycle Name	Applications Open	Applications Close	Available to Award
iFORWARD Year 2 (2023-2024)	4/3/2023	4/28/2023	\$70,000

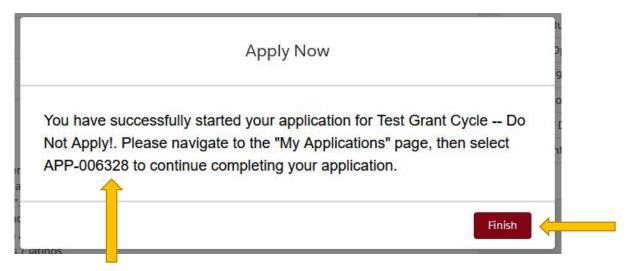
5. On the next page, read the application details and instructions. If you decide to submit an application, click the "Apply Now" button on the upper-right portion of the screen, below your name.



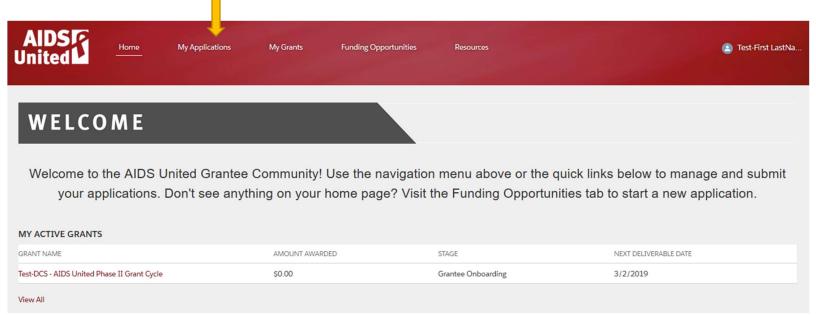
6. On the next screen, click "Yes" and then "Next" to confirm that you would like to apply.



7. On the confirmation box that appears, note the last four digits of your application number and click the "Finish" button.



8. Next, go to the "My Applications" tab.



- 9. There you will see the application you just created, as well as any other applications you have submitted in the past through AIDS United's Grantee Community Portal. Two things to note:
  - a. Your new application will show up at the bottom of the list.
  - b. If your application for this grant cycle does not show up, click the "View All" button to be taken to a longer list of your applications.

### MY APPLICATIONS

Click on an Application Name below to make changes to an active application, or to view your previously-submitted applications. To start a new application, visit the Funding Opportunities tab.

#### MY ACTIVE APPLICATIONS

Application Name	Grant Cycle	Project Title	Application Status	^
APP-006109	Test Grant Cycle - Do Not Apply (OLD)		Application Started	
APP-006842	IFORWARD Year 2 (2023-2024)	title	Application Started	
APP-006848	iFORWARD Year 2 (2023-2024)		Application Started	
APP-006849	iFORWARD Year 2 (2023-2024)		Application Started	
APP-006850	iFORWARD Year 2 (2023-2024)		Application Started	~
APP-006850	iFORWARD Year 2 (2023-2024)		Application Started	



10. Click the application name that you made a note of above, to the left of the initiative name. The application name will begin with "APP-" and be followed by a six-digit number. (You will not have multiple versions of applications as below. This is one of our test accounts.)

## MY APPLICATIONS

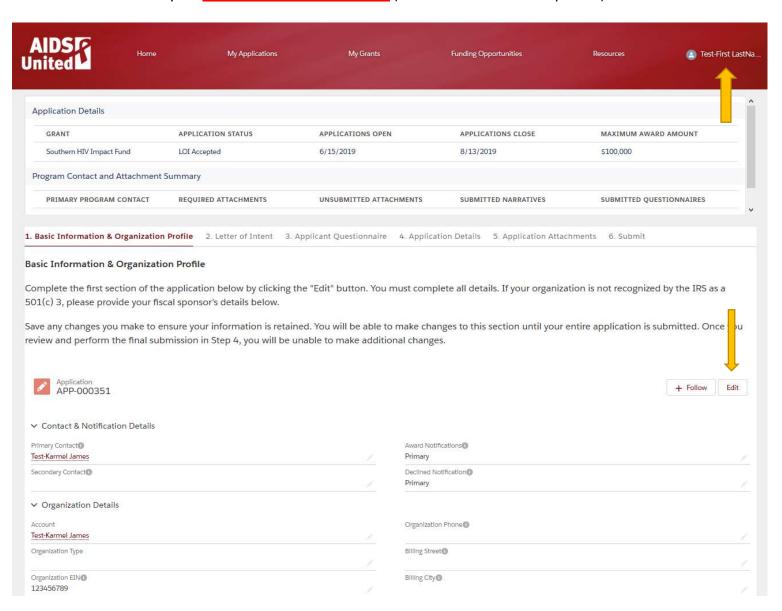
Click on an Application Name below to make changes to an active application, or to view your previously-submitted applications. To start a new Funding Opportunities tab.

#### MY ACTIVE APPLICATIONS

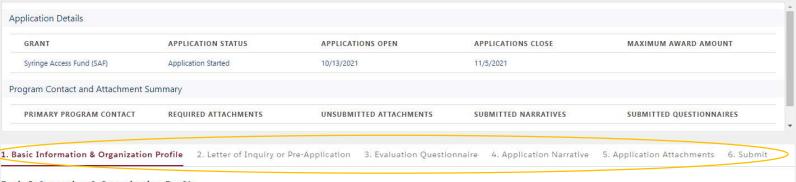
Application Name	Grant Cycle	Project Title	Application Status
APP-006200	SSPs & COVID-19 (CDC-RFA-OT18-1802)	1	Application Started
APP-006206	SSPs & COVID-19 (CDC-RFA-OT18-1802)		Application Started
APP-006324	Conexiones Positivas Piloto (2022)		Application Started
APP-006382	HRSA CCTA 2iS (Using Innovative Intervention Strategies)		Application Started
APP-006387	Conexiones Positivas Piloto (2022)		Application Started
APP-006388	Conexiones Positivas Piloto (2022)		Application Started
APP-006398	iFORWARD (2022)		Application Started

- 11. You will then be taken to the application screen. <u>Verify your contact</u>

  <u>information on the first page</u> and click "Edit" (the down arrow) to make any updates.
  - a. Then click on your name (the up arrow), select "My Profile," and verify your <u>email address and pronouns</u> (the latter of which are optional).

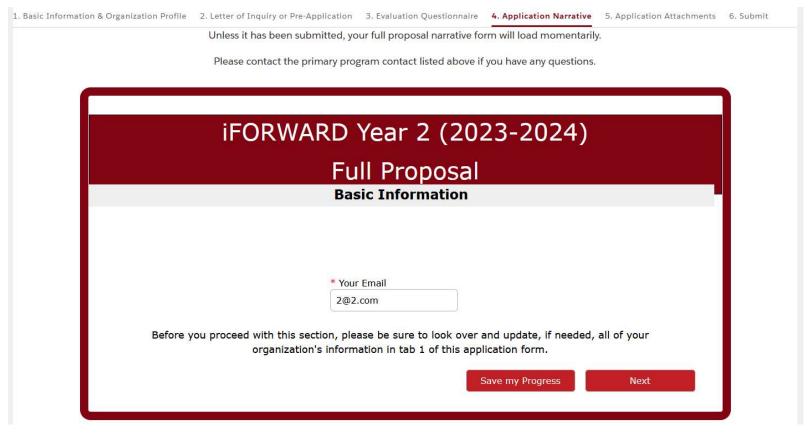


12. You will then proceed across the numbered tabs at the top of the application, entering your responses. For a full proposal, *you will need to look at tabs 1* (which you did above), 4, 5, and 6. You can ignore tabs 2 and 3.



Basic Information & Organization Profile

13. In tab 4, you will find your full proposal form, which will load after a few seconds. On the first page, you may or may not see an email address field. If you do, verify that it's correct and then hit "Next." If you don't see an email field, just click "Next."



14. You'll then get to the second page of the full proposal form, the first one with questions for you to answer.

	Full Proposal
	Organizational Overview
	The proposal deadline is April 28, 2023, at 5:00pm ET.
ase verify you	ur organization's information in Tab 1 of this application form to cover questions 1-12 in the RFP.
Another d Volunteer  * 14. Total org	Advocacy-based organization AIDS service organization Community-based organization ed organization Government Private clinic Another clinic or health provider irect service organization Black Greek Letter Organization Social Fellowship Service Organization Professional Organization Other  anizational budget, rounded to the nearest dollar (current fiscal year) (DO NOT ENTER COMMAS OR INTO THIS FIELD.)

15. Navigate through the proposal by filling out the fields and clicking "Next" at the end of each page. Note that sometimes you may have to wait a few seconds for the form to load into a new page.

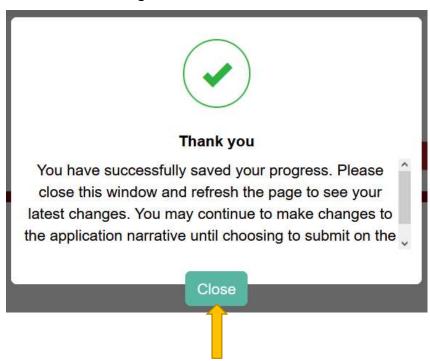
- 16. A few notes on the application form itself.
  - a. If you are pasting your responses from another document where you've saved your answers, you'll find that right-clicking in rich text fields does not bring up a paste option. To paste in your answers, hit Control-V if you have a PC or Command-V if you have a Mac. Those key combinations will allow you to paste something that you've copied into almost everything on your computer or online.
  - b. The funding opportunity for which you're applying may have word limits or character limits on the questions you're responding to. <u>While our system does have the ability to enforce character limits, it cannot do so for rich-text fields</u> (i.e., places in which you can use italics, bold, and other formatting in your responses). For those fields, you can enter as many characters as you like and the error will not happen until you try to submit. That error message will come directly to AU's Senior Grants Manager, who will reach out to you to let you know that there was an issue with your submission. To avoid that, we have written this brief explanation of how to monitor your character limits using a free online tool before you submit.
  - c. Note that you can save your progress at any point by clicking the middle red button on the bottom of each page and then hitting the green "Continue" button on the subsequent window, which is shown at step 23. On that screen, the "Continue" button saves your responses but does not submit them to AIDS United.

Anterior // Previous

Guardar mi progreso // Save my Progress

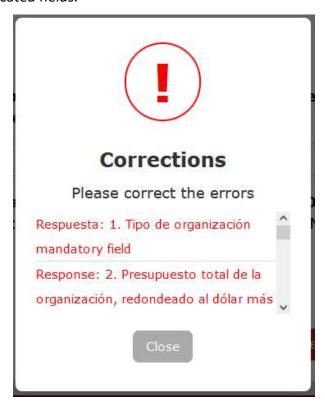
Siguiente // Next

- 17. You can then log out and return to your application as many times as you would like before you submit.
  - a. <u>We recommend that applicants click "Save my Progress" at the end of</u> the first full page of the application shown in step 14 above.
  - b. You will receive this confirmation of your save. Click the "Close" button when finished reading it.



c. After you've received that confirmation, you will need to refresh the page on your web browser or sign out and back in again for the form to pull your saved responses back in.

18. If you receive <u>error messages</u> when trying to proceed to another page or trying to save your application to work on later, you likely have not filled in a required field or have put in a figure that is outside the allowable range (e.g., the amount you're requesting is too high for the initiative to which you're applying). See, for example, the error below, which is telling the applicant that they have left out answers that are mandatory. Click the "Close" button (the gray field below) and correct the indicated fields.



- 19. Once you have filled out all of your responses in tab 4, you will be ready to submit that portion of your application. <u>Please note that the submission process in tab 4</u> is multi-step and is described in detail below.
- 20. First, you will need click the "I confirm" box and the "Review my Narrative" button (the latter is grayed out below because the "I confirm" box is not checked), which will take you through a review of each page so you can confirm that all of your answers are full and accurate.

## iFORWARD Year 2 (2023-2024)

## **Full Proposal**

**Review and Submit** 

#### You have reached the end of the narrative portion of this application.

You may continue to save your progress and make further changes while the application window is open by using the "Save my Progress" buttons on each page.

If you have completed the narrative and are ready to conduct a final review of your responses, upload your attachments, and submit, please confirm and use the "Review my Narrative" button below. After you click that button, you will be taken back to the first page of this form. Navigate through the pages, verifying that your answers are full and correct. When you have finished your review, you will return to this page and will be able to click the "Submit" button below.

Please note that once you complete your review and submit your form, you will no longer be able to make updates to this portion of the application.

No. Take me back to the first page.

\* Yes. I wish to review and submit my narrative.

I confirm

Review my Narrative

21. Once you have confirmed all of your responses, you will return to the page above. Click "Submit my Narrative," which will have become active, as shown below.



22. You will then land on a page that gives you the final opportunity to go back and edit your response. If you are sure you're ready to submit and have read all the text on the page, click the "I confirm" button, and hit "Submit my Narrative."

Should you have any questions about any portion of the application, please reach out to the iFORWARD team at iforward@aidsunited.org.

Once you have submitted your narrative here, please proceed to tab 5, upload your attachments, and do your final submission in tab 6.



- 23. The application will bring up a white form with all of your answers filled in, the bottom of which you see below. You <u>must</u> hit "Continue" on the bottom of this page for your narrative to be fully submitted! This is the page that generates the PDF that reviewers will see when evaluating your proposal. A few other notes:
  - a. If you see a section with no responses, that will be the section corresponding with the type of grant (project or infrastructure support) you are not applying for.
  - b. You will also see this page if you want to save your responses and come back to finish later. In that case, the "Continue" button saves your responses but does not submit them to AIDS United, as described in step #16.)
  - c. This is the page that you can save offline or print if you would like a record of your narrative as submitted to AIDS United.
- Protection of Information: What is your plan to protect clients', patients' and communities' demographic information and follow guidelines in the Health Insurance Portability and Accountability Act of 1996 (HIPAA)? (unscored)

Test

10. Exemptions and Technical Assistance: Do you intend to seek an exemption from collecting any of the data requested for the project evaluation? If yes, please describe the exemptions you would seek and provide brief justification(s). What technical assistance would you anticipate requesting to support implementation of your proposed iFORWARD grant and evaluating that work? (unscored) (Note that AIDS United does not view applications asking for an exemption or for TA any less favorably than those that don't.)

Test

Continue

Close



24. The next screen will show a confirmation of your submission, although you will likely have to scroll up to see it.

# iFORWARD Year 2 (2023-2024) Full Proposal

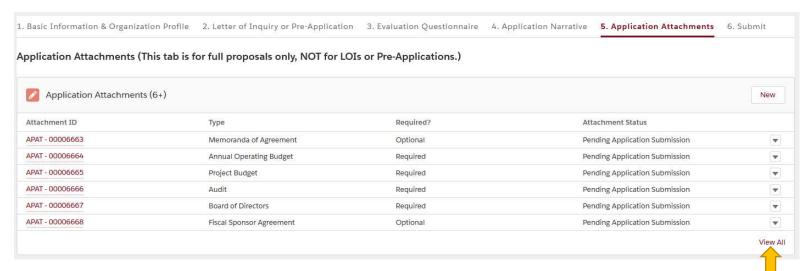
#### Thank you for submitting your proposal!

If you have not yet verified your information in tab 1, please do that now.

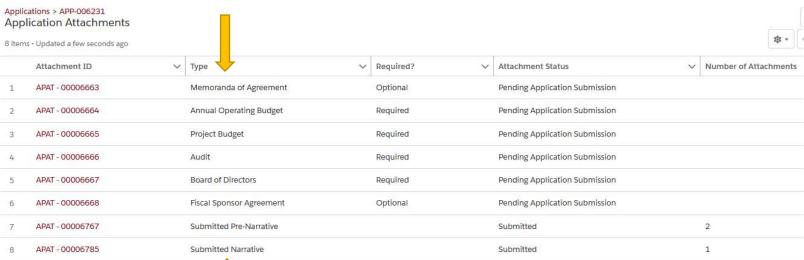
Should you have any questions about any portion of the application submission process, please reach out to the senior grants manager, Shannon Wyss, at <a href="mailto:grants@aidsunited.org">grants@aidsunited.org</a>.

As a final reminder, please proceed to tab 5, upload your attachments, and do your final submission in tab 6.

- 25. Then navigate to tab 5 at the top of your screen to add your attachments, as described in detail below.
- 26. Give the attachments list a few seconds to load, and then click "View All" in the bottom right of the screen:

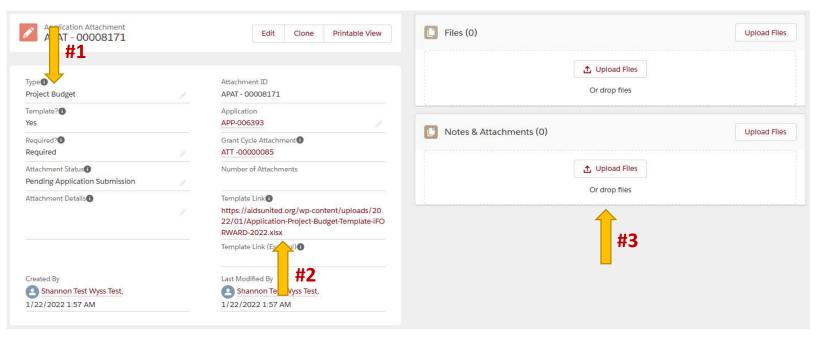


27. The next screen will show you all attachments for this funding opportunity. (The Submitted Narrative (up arrow) is a PDF of your submitted narrative from tab 4 above.) If you click on the "Type" heading below (down arrow), the list will sort alphabetically in case it's not already that way. Click on any Attachment ID to access the place to upload.

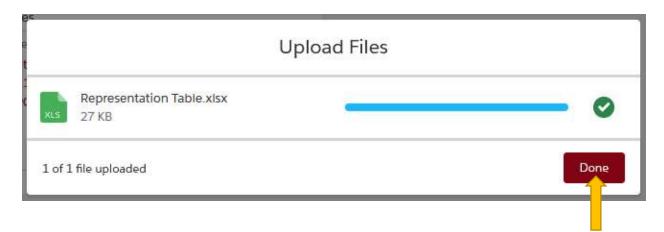




- 28. Here, you'll see the same details as on the previous screen, as well as the following information:
  - a. The attachment type and, right below it, whether it has a required template (arrow #1)
  - b. A link from which applicants can download the attachment template, if needed (arrow #2)
  - c. An upload prompt, where you can browse (with the "Upload Files" button) to or drag & drop your attachments (arrow #3). If you see both "Files" and "Notes & Attachments" upload prompts here, you can use either; your documents will be automatically attached in both places.

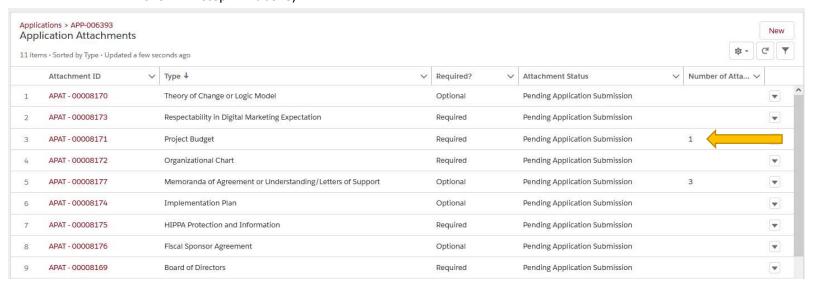


29. Click the "Done" button when your file has finished uploading:

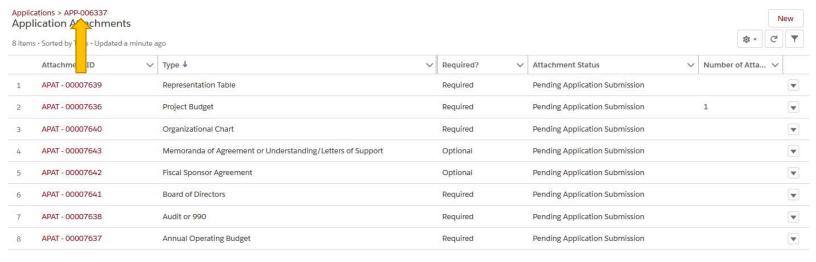


30. To return to your attachments list, hit your browser's "back" button.

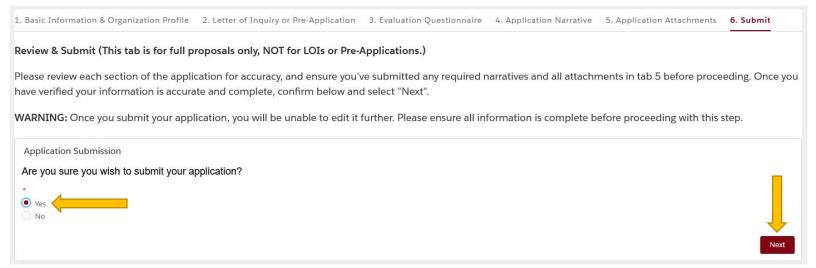
31. In either case, you will see an indication that your attachments have been successfully uploaded in the Number of Attachments column (this will only show on the "View All" attachments page shown in step #27 above):



- 32. Continue uploading your attachments until you're finished, verifying that any attachments that are optional might be required for your request type, such as Memoranda of Agreement/Letters of Support. Note that you can upload multiple attachments at each upload prompt, which will likely be relevant only for Memoranda of Agreement/Letters of Support.
- 33. When you've uploaded all of your attachments, return to your application by clicking on the application name link:



34. Then go to Tab 6, Submit. If you would like to submit, confirm with the "Yes" radio button (left-pointing arrow), and click the "Next" button (down arrow).



35. You will get the confirmation message below, as well as an email confirming your submission. If you do not receive a confirmation email from noreply@salesforce.com with the subject line "Thank You for Your Submission" and it's not in your spam folder, then you have not fully submitted your proposal. Please go back and make sure you submitted in tabs 4 and 6. If you have, please contact AU at <a href="mailto:swyss@aidsunited.org">swyss@aidsunited.org</a> right away. We'll be happy to confirm your submission.

Application Submission

Thank you for submitting your application.

36. When you return to your My Applications tab, you will now see that your proposal has been submitted and shows up in the My Completed Applications section:

MY COMPLETED APPLICATION	ONS		
Application Name	Grant Cycle	Project Title	Application Status
APP-006106	Test Grant Cycle - Do Not Apply		Awarded
APP-006197	SSPs & COVID-19 (CDC-RFA-OT18-1802)	4	Application Submitted
APP-006198	SSPs & COVID-19 (CDC-RFA-OT18-1802)	title	Application Submitted
APP-006225	2021-2022 Syringe Access Fund (SAF) Round 12	1	Application Submitted
APP-006226	2021-2022 Syringe Access Fund (SAF) Round 12	1	Application Submitted

# Have questions during the application process?

If you have any questions regarding the *content of the application*, please reach out to the team as directed in the request for proposals document that you received from AIDS United.

If you have any questions regarding *navigating the online portal or other technical issues*, please contact Shannon Wyss, Senior Grants Manager, at <a href="mailto:swyss@aidsunited.org">swyss@aidsunited.org</a>.

Please include the following information when you write us:

- Your web browser;
- What happened and where you were in the application form when it happened; and
- A screen shot of what you saw that was unexpected.

Thank you for your interest in a grant from AIDS United and for your work in the struggle against HIV!