Blue Cross and Blue Shield of Minnesota Foundation

Applicant User Guide

For additional assistance using our system, please call or email:

Janet Jablonske, Foundation Operations Manager at Janet.Jablonske@bluecrossmnfoundation.org or 651-662-7417

or

Kristin Kutzke, Community Funding & Information Systems Analyst at Kristin.Kutzke@bluecrossmn.com or 651-662-3749

Contents

Getting Started

All grant applications to the Blue Cross Foundation must be submitted through our online funding portal. To view open funding opportunities and apply for a grant begin by logging into Blue Cross' funding portal at this address: https://bcbsmn.smartsimple.com/s_Login.jsp

Login Page

New Users

New applicants must register and create an account in the system before they can apply for a grant. To begin your registration, click on the **Organization Register Here** button shown below.

Returning Users

If you have already created an account enter your email address and password at the Login screen. If you forget your password or are having trouble accessing your account, please click Forgot Password? A temporary password will be emailed to you. (If you do not receive an email in 15 minutes or less be sure to check your spam/junk mail folders.)
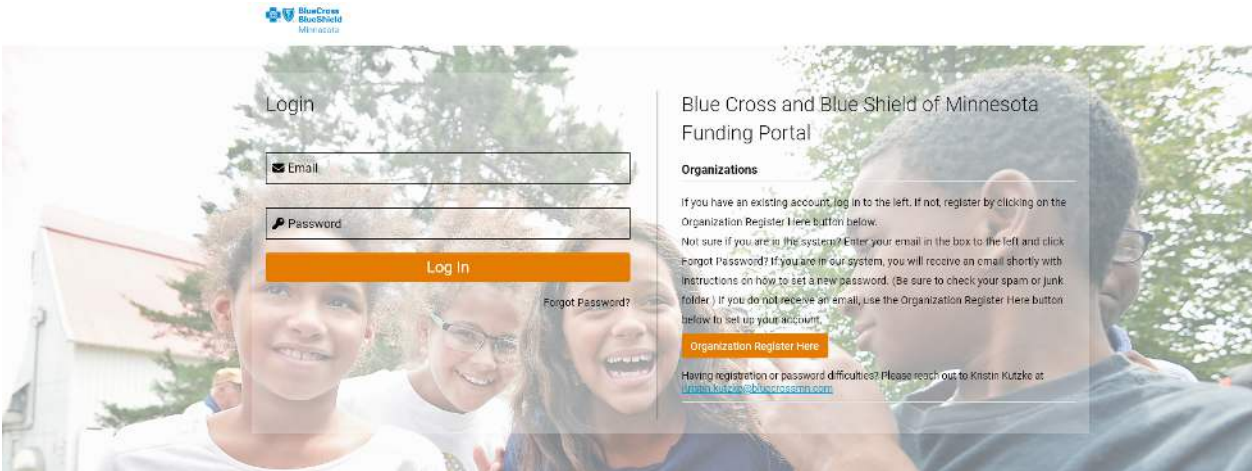
When prompted, enter the temporary password that was emailed to you in the Current Password field and create a New Password noting the password policy.
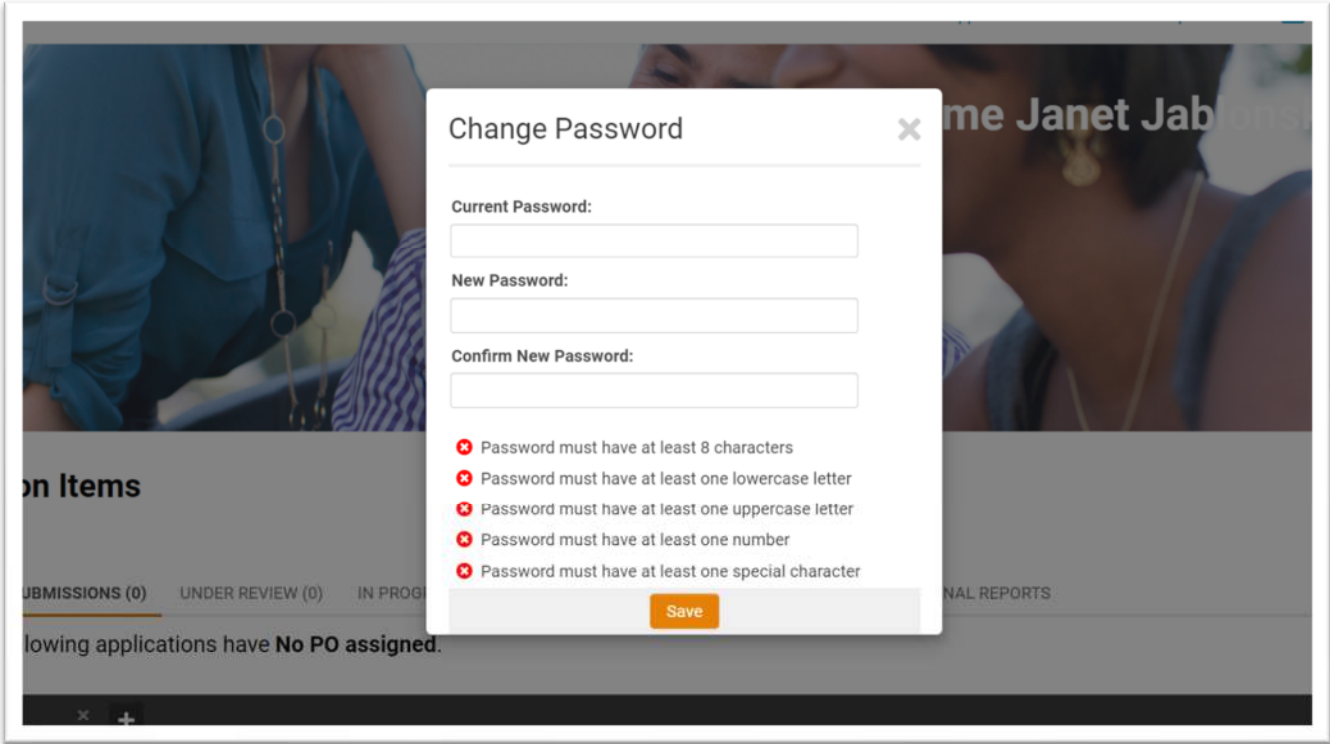
Organization and Contact Registration Page

When you click on **Organizations Register Here** you will be taken to the Organization and Contact Registration Page.


If your organization is a public charity, click on IRS Registration to look for your organization.

How to use the IRS Database Search function:
- Enter your organization's name (keyword search is sufficient, example: "Sample" instead of "The Sample Foundation") **or**
- Enter your organization's FEIN/TIN (do not include spaces or dashes, example: 123456789)
- Click **Search**
- When you find the name of your organization in the search results click on it and close the box.
- Your organization's information will pre-populate on the form. Enter your personal contact information also and hit **Submit**.
- A temporary password will be emailed to you. Please be sure to check junk/spam email folders if you do not see an email.

If your organization does not have an EIN or does not appear within the IRS database click on Open Registration. Use the legal name lookup field to see if your organization is already registered in our system. If not click on the Manual Organization Registration link to complete the required fields on the registration form and hit Submit.

Applicant Portal
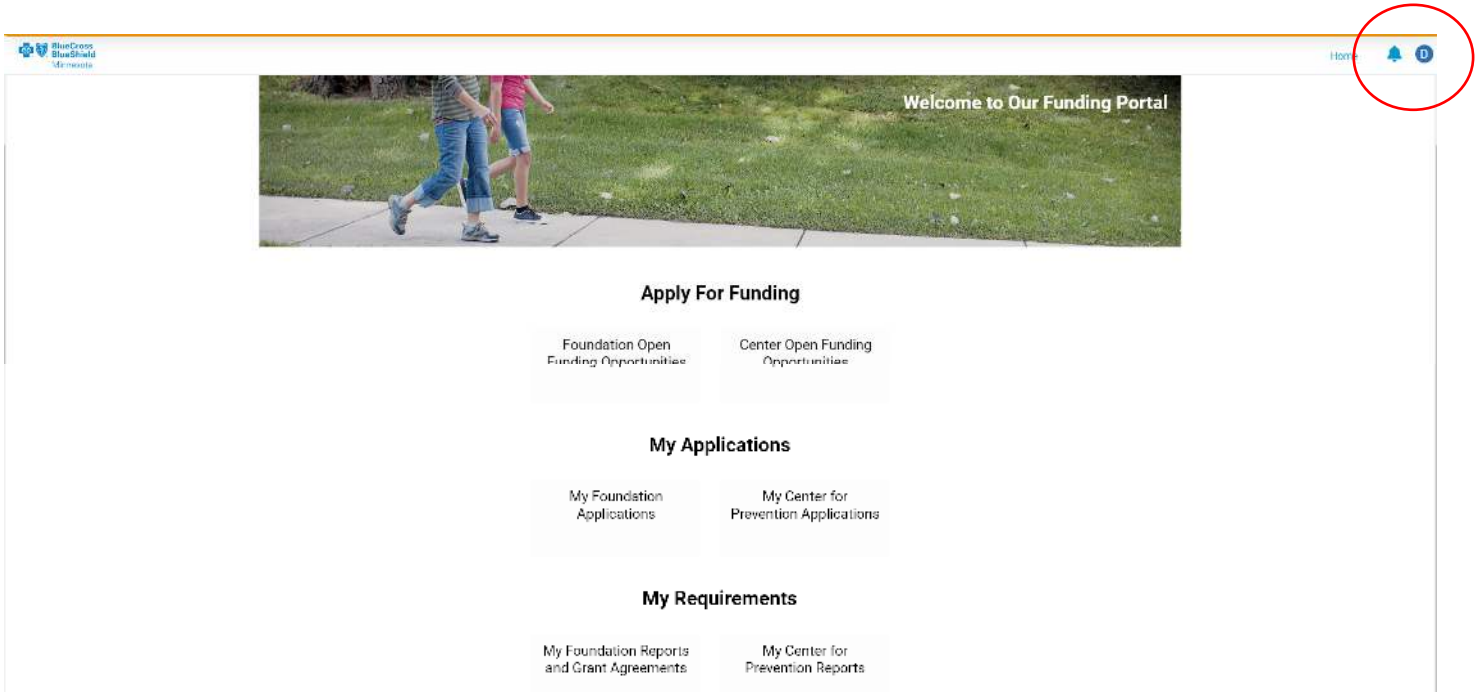
*To change your password or update your personal or organization profile details click on the circle at the top right-hand side of the page.

Apply for Funding
If the Foundation has an open funding opportunity available the link to the application will be found in this section.

My Applications
My Foundation Applications

In Progress: Applications you have started and saved as well as any application you have been invited by the Foundation to complete.
Under Review: Submitted applications that are being reviewed by the Foundation or that have been sent back to you for additional information.
Awarded: Active grants
Closed: Applications/Grants in the following statuses - Approved, Declined or Withdrawn

My Requirements
My Foundation Reports and Grant Agreements

If you have been awarded a grant, this section of your portal is where you will find your grant agreements, assigned progress or final reports as well as reports you have completed and submitted to the Foundation.

5

Grant Agreements: If you have been awarded a grant, the grant agreement that you need to sign and upload back into the system will be located here.

Reports Due: Any yearly progress or final reports scheduled for your grant will be here.

Report History: Includes a listing of your submitted reports.

The Grant Application

Completing Your Application

- All applicants must complete the eligibility questionnaire preceding an application for an open funding opportunity. After submitting the questionnaire, you will receive confirmation of whether or not you are eligible to apply.

- You will then be asked if you are using a fiscal sponsor for your project. Simply select Yes or No when prompted. If you select Yes, please see the special instructions below.

- All organization information must be up to date before you begin the application. Click on Organization Details and update information as needed.

- To print the application to review before you begin click on the **Print Preview** button and export the document to a pdf, then print or save the pdf.

- Your application will automatically save every five minutes when you are actively working on it. You may want to save your application more often to avoid losing your work. The session will timeout after 50 minutes of inactivity.

- When you have answered all questions and uploaded all necessary attachments, hit the **Review and Submit** button. If there are any errors a message will appear in red at the top of the page. Click on each error item to correct the issue. After you have corrected any errors, hit **Submit**.

- You will receive an email confirmation of your application submission.

Using a Fiscal Sponsor

If you are using a fiscal sponsor for your grant project, you must first create and register your own organization/collaboration in our online application system and create yourself as a contact under the organization you created. Use the Open Registration option if your organization does not have an EIN.

THEN, when you begin the application, you will be given the opportunity to identify and select your fiscal sponsor. (See screenshot below). Select YES when asked if you are using a Fiscal Sponsor.

You will then be prompted to search for your fiscal sponsor in our database by typing in their legal name or EIN number. ==If you do not find them in the system, ask the fiscal sponsor organization to register and create a profile in the system.== Once they have completed that step you can then go back and add them as the fiscal sponsor to your application.

Inviting a Collaborator

You may invite other individuals to review or add content to your application. These collaborators can be within or outside of your organization. Once you have started your application, click on **Collaborators** on the left side of the screen. (Please note, adding a collaborator will provide them with access to your full application.)


Click on the (plus sign) to add the name and email address of the person you would like to invite to work with you on your application.
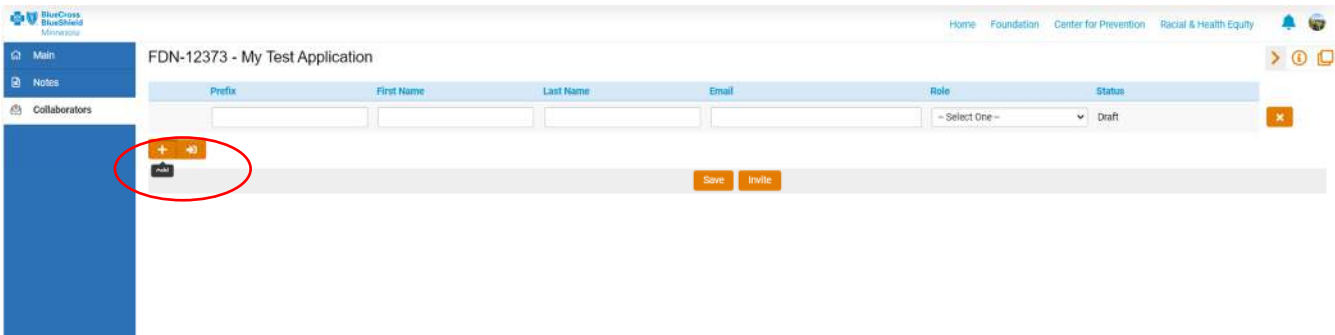
From the drop-down menu select "Collaborator" and then click Invite. The collaborator will receive an email asking them to Accept or Decline the invitation.
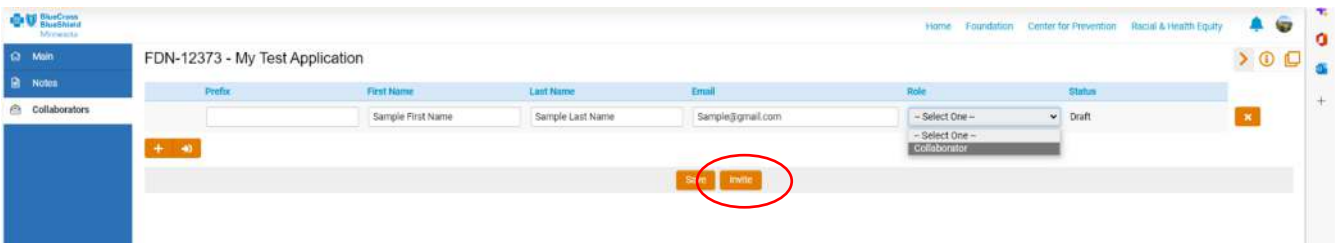
When they accept the invitation, the collaborator will receive a link to sign into the grants management portal to gain access to the application. Note: If they already have an account, they should log in using their current email and password. If they do not, they will be asked to register and create a profile in the system. Once in the system they will find the application in their portal under **Foundation > My Grants>Applications in Progress**.
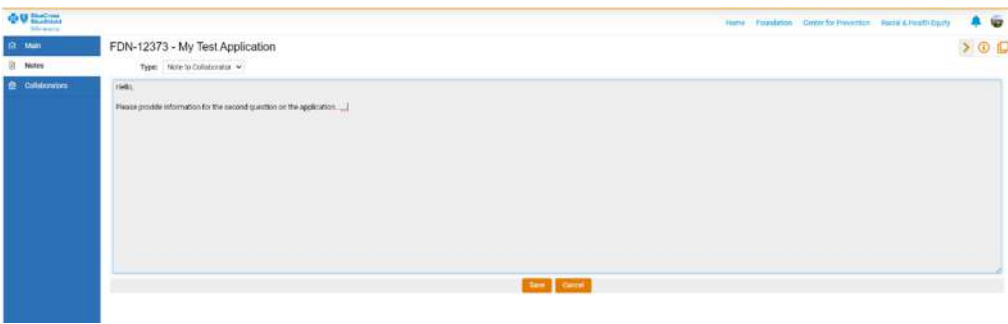

You can communicate with your collaborator(s) using the Notes tool on the left side of the screen. Select "Note to Collaborator" from the Type drop down menu. *Foundation staff will not be able to view these notes.*

Approved Grant Application

If your application has been selected for funding, you will receive a phone call from your Blue Cross Foundation program officer with details of your approved grant.

8

Next, the Foundation's operations manager will prepare a grant agreement and upload it to your online account. You will be notified via email when the agreement is ready for you to review, sign and upload back into the system. Please be sure to check spam/junk folders for this email.

The agreement will reside under **My Requirements > My Foundation Reports**
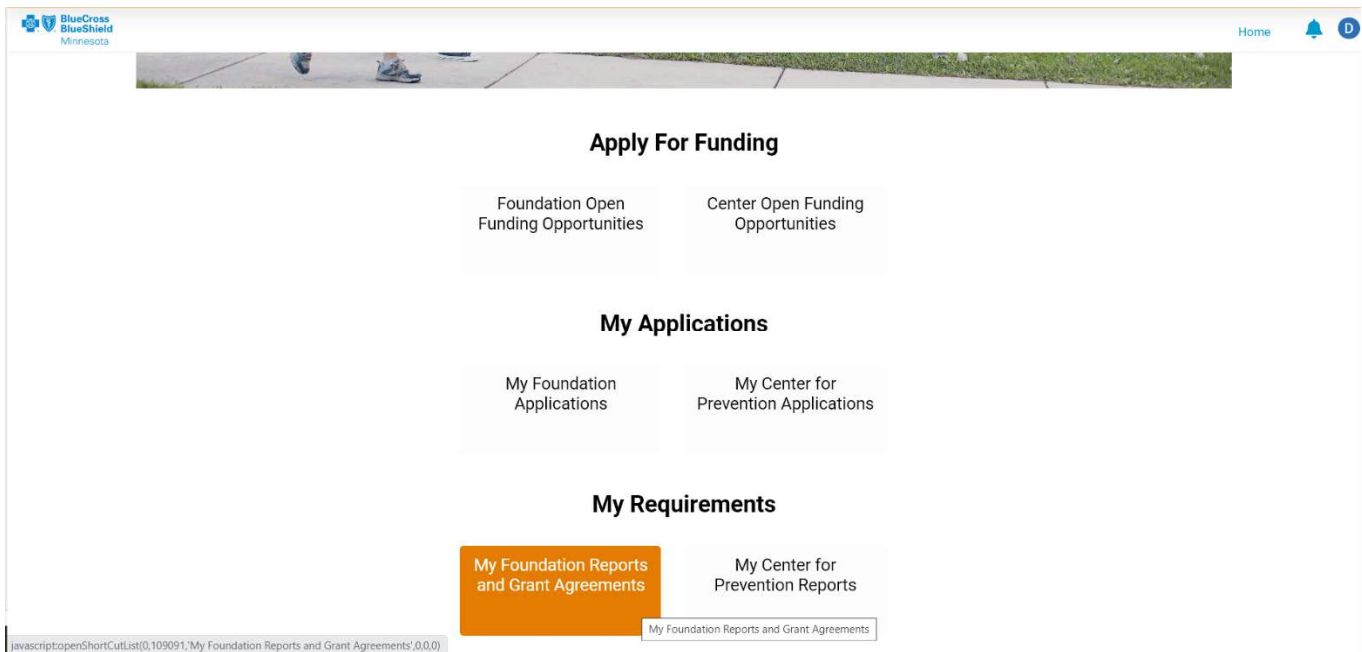
Instructions for signing and uploading your grant agreement:

1. From the list below, select and download the Grant Agreement for your recently awarded grant.
2. Print out the Grant Agreement, review and sign.
3. Once signed, scan the signed copy as a PDF and attach it using the **Attach Signed Agreement** button below.
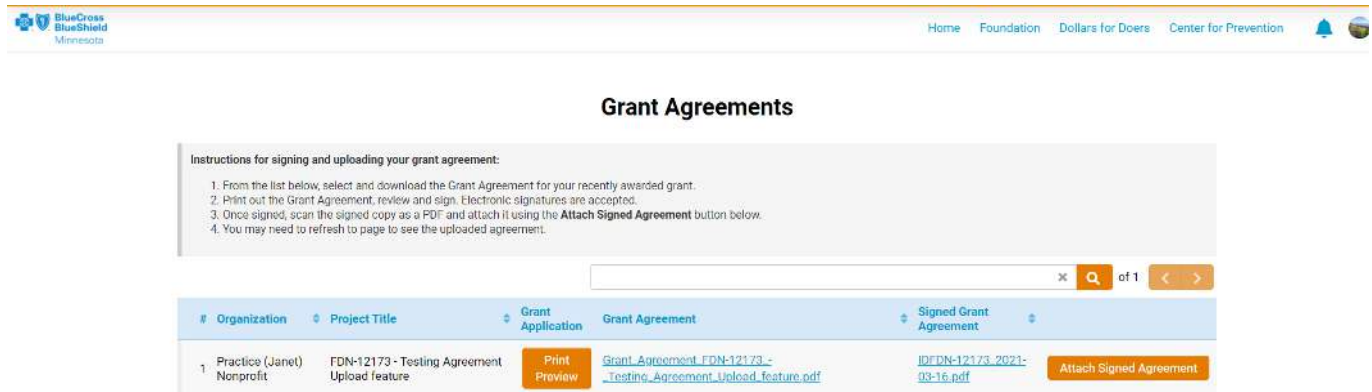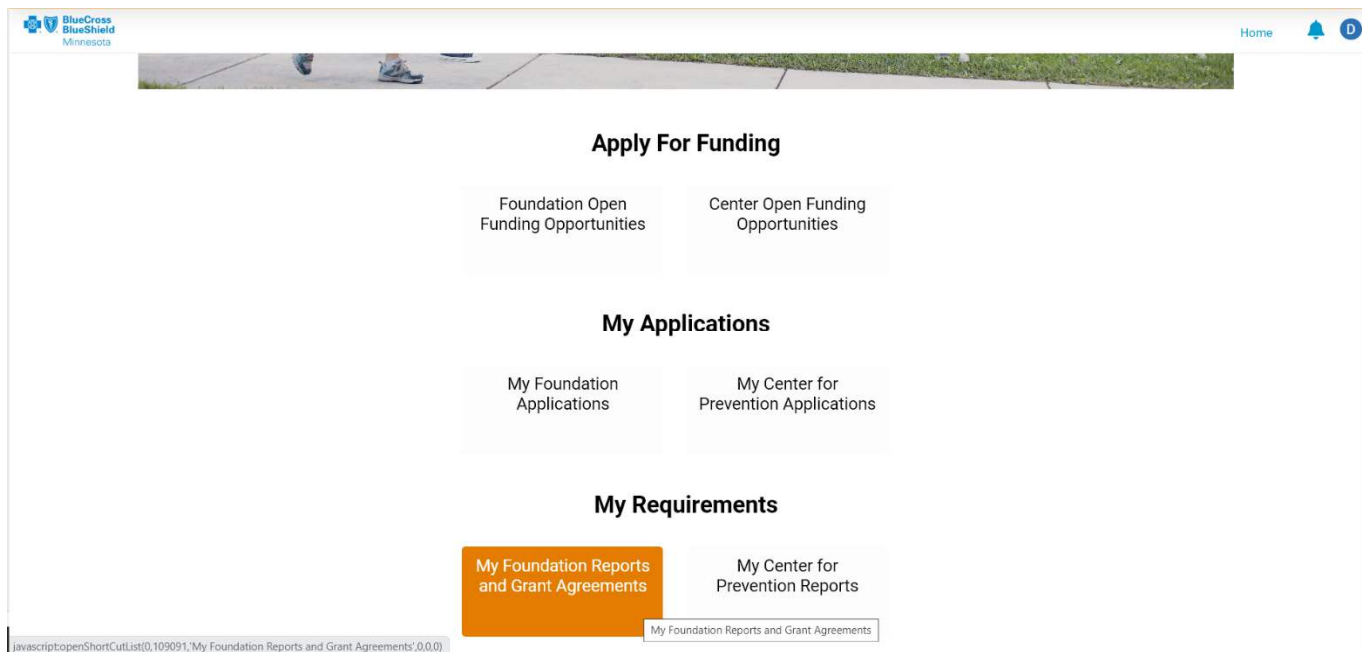
Declined Applications

If your application has not been selected for funding, you will receive an email notifying you of our decision to decline your request. Please be sure to also check your spam/junk folders for notification emails.

Progress Reports

A progress report on your grant will be assigned to you and will be found in your portal under **My Requirements > My Foundation Reports**. Click on the **Application Name** to view and complete the report form and upload the required budget documents.

Using the Notes feature

On your application you will see a Notes tab on the left side of the screen. You will be able to read messages from Foundation staff here as well as send messages back to Foundation staff as needed.

If Foundation staff send you a note you will receive an email which will contain the contents of the note as well as instructions on how to log into the portal to respond to the message in the Notes tab.

Simply click on the Notes tab to open it and read your message. To respond, click on New, type your message and then click Save. The message will be sent back to Foundation staff.

For additional assistance using our system, please call or email:

Janet Jablonske, Operations Manager Janet.Jablonske@bluecrossmnfoundation.org or 651-662-7417
Kristin Kutzke, Community Funding & Information Systems Analyst at Kristin.Kutzke@bluecrossmn.com or 651-662-3749