Blue Cross and Blue Shield of Minnesota Foundation

Applicant User Guide

Updated 5/6/2026

For additional assistance using our online funding portal, please email or call:

Erin Dirksen, Grants Management and Operations Administrator
erin.dirksen@bluecrossmnfoundation.org
651-662-9511

or

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

Contents

Getting Started **3**
New Users 3
Returning Users 6
Applicant Portal **7**
Profile 7
Apply for Funding 8
My Applications 9
My Requirements 10
Application Process **11**
Completing Your Application 11
Using a Fiscal Sponsor 11
Inviting a Collaborator 13
Using the Notes Feature 16
Approved Applications **18**
Notification 18
Grant Agreement 18
Progress Reports and Final Reports 20
Declined Applications **21**
Notification 21

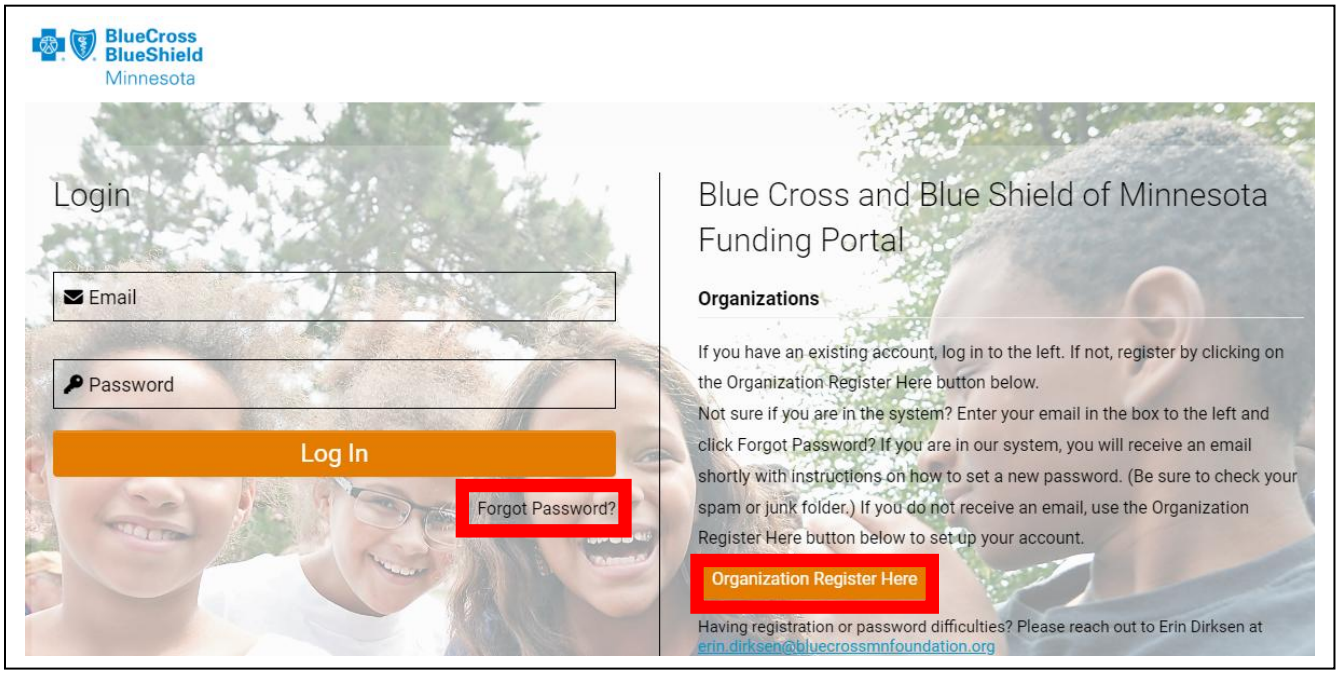
Getting Started

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

New Users

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

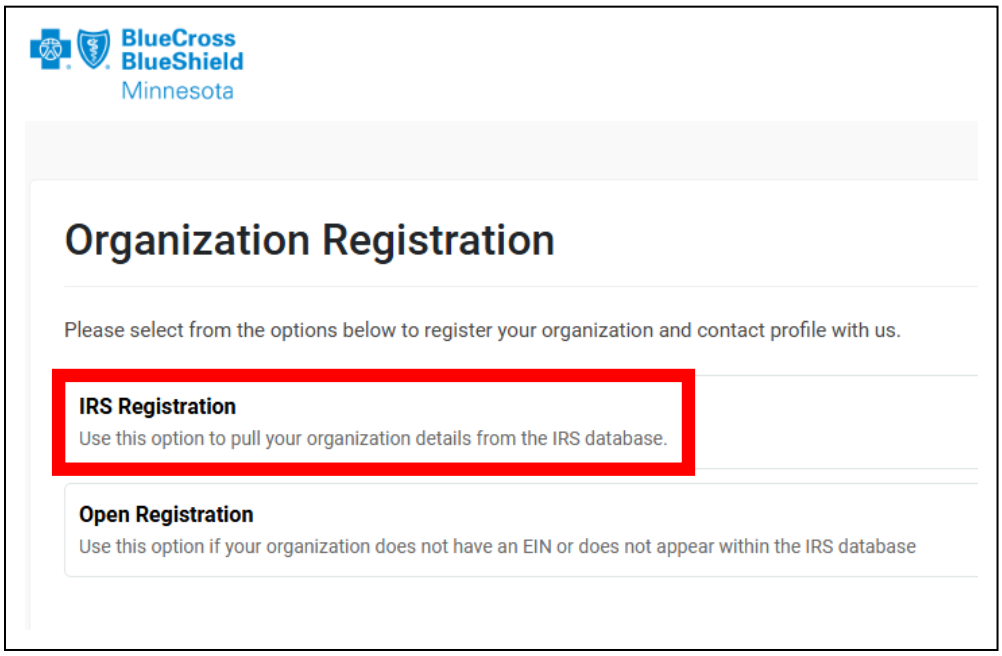
To find out if your organization is already registered, jump to page 5 and follow the **Open Registration** instructions. This will allow you to register yourself as a contact for your organization.



Organization and Contact Registration

After you click on **Organizations Register Here,** you will be directed to the Organization Registration page.

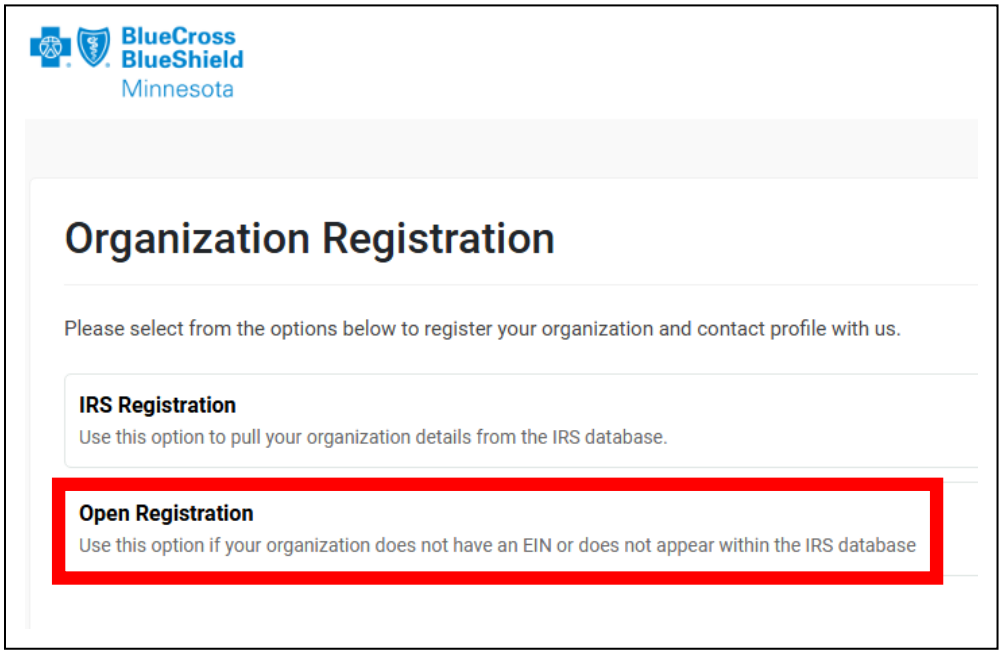
If your organization is a public charity, click on **IRS Registration** to look for your organization.



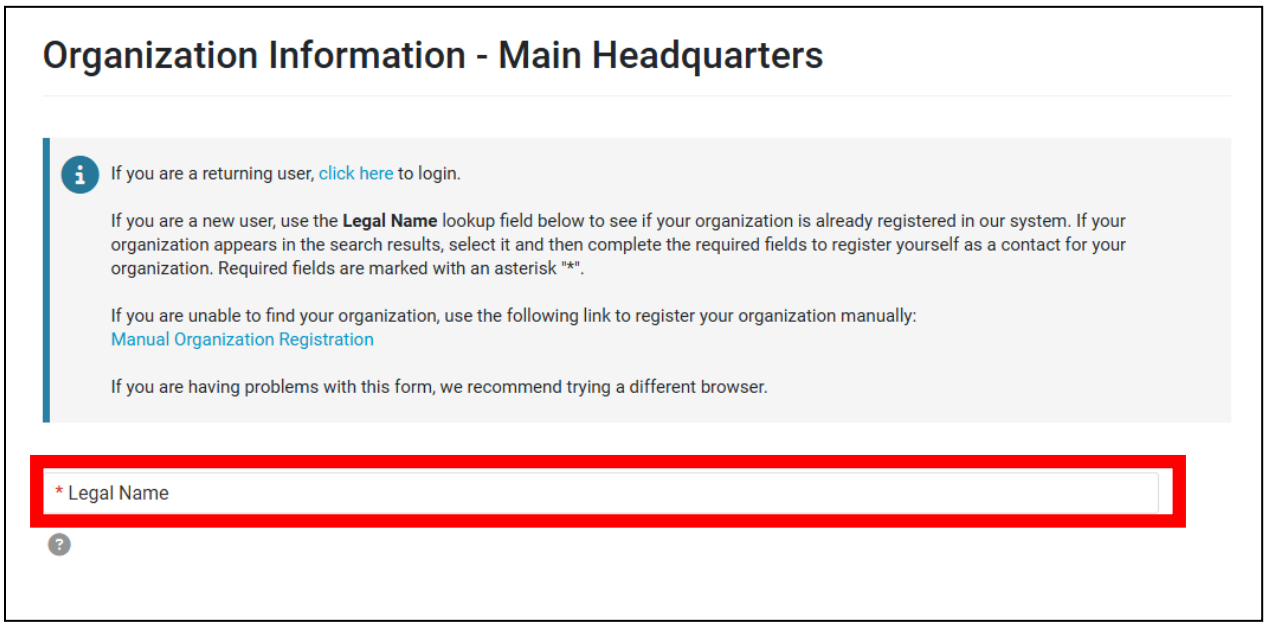
How to use the IRS database search function:

- 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 own contact information and click **Submit**.
- A temporary password will be emailed to you. If you do not see the temporary password email in your inbox, please check your spam/junk folder.

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 your organization appears in the search results, click on it and then complete the required fields to register yourself as a contact for your organization.

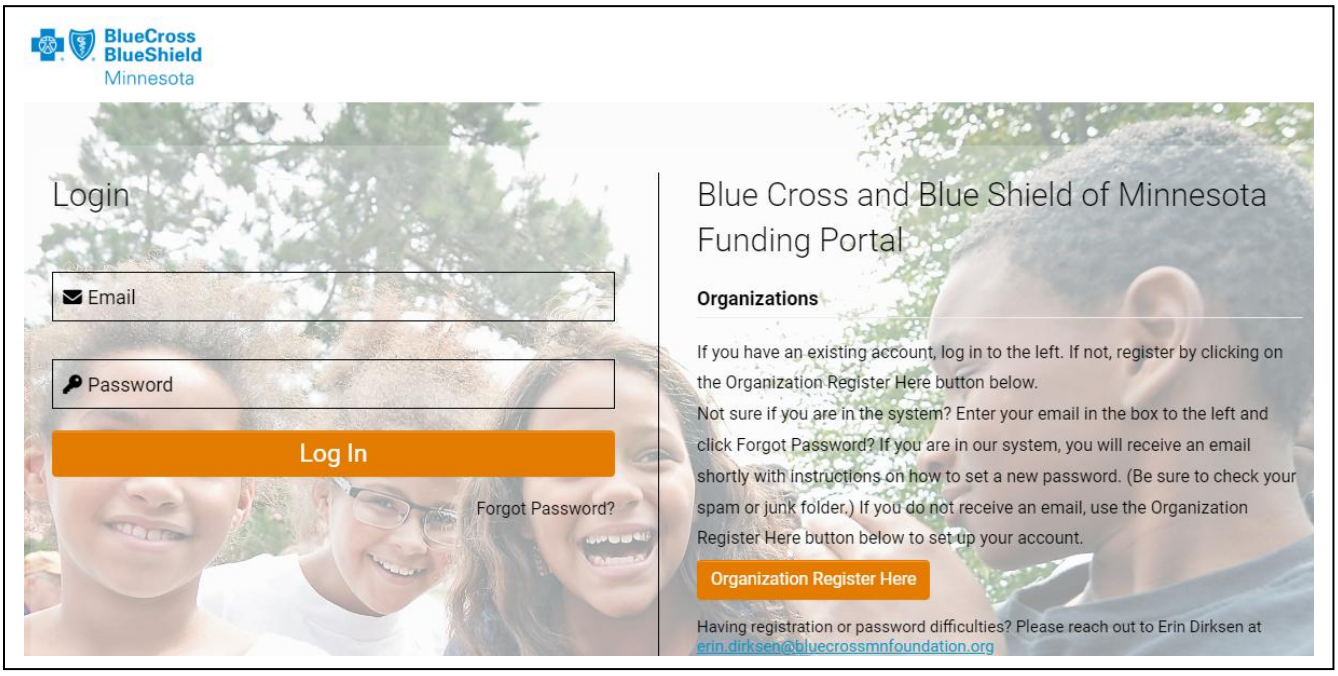


If you try to register using an email address that is already in our system, you will see a message indicating that an account exists for that email address. In that case, please use the **Forgot Password** button on the Login page to reset your password. For more information on resetting your password, please see the **Returning Users** section below.

If your organization is not in our system, click on the **Manual Organization Registration** link (above the Legal Name box) to complete and submit the required fields on the registration form.

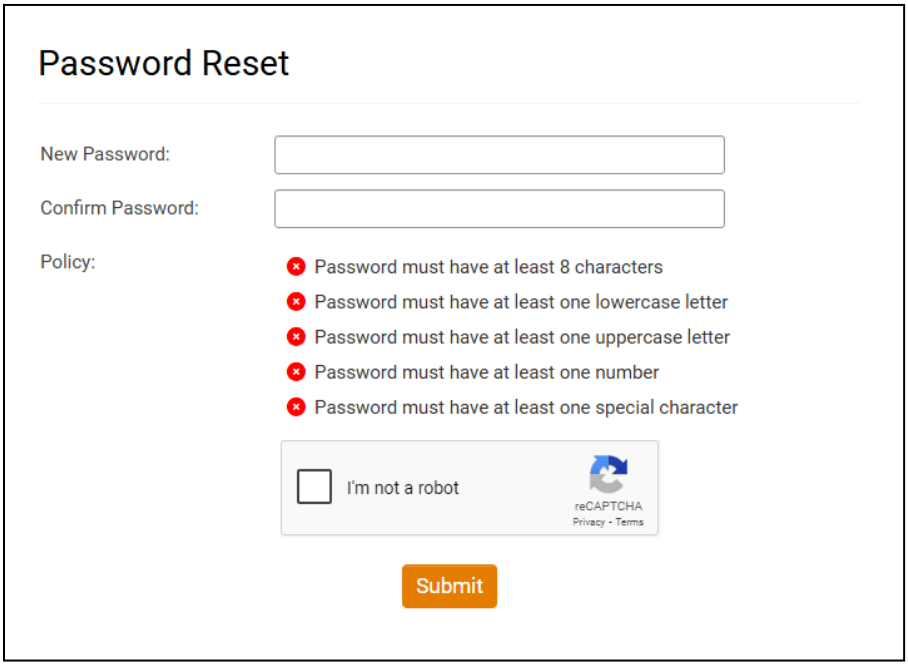
Returning Users

If you have already created an account, enter your email address and password on the Login screen.



If you forgot your password, click on **Forgot Password** at the bottom of the Login screen. It will ask you to enter your email address and you will receive a password reset email. If you do not see the password reset email in your inbox, please check your spam/junk folder.

From the password reset email, click the link to create a new password. You will be directed to a page where you can create a new password, noting the password policy.



Applicant Portal

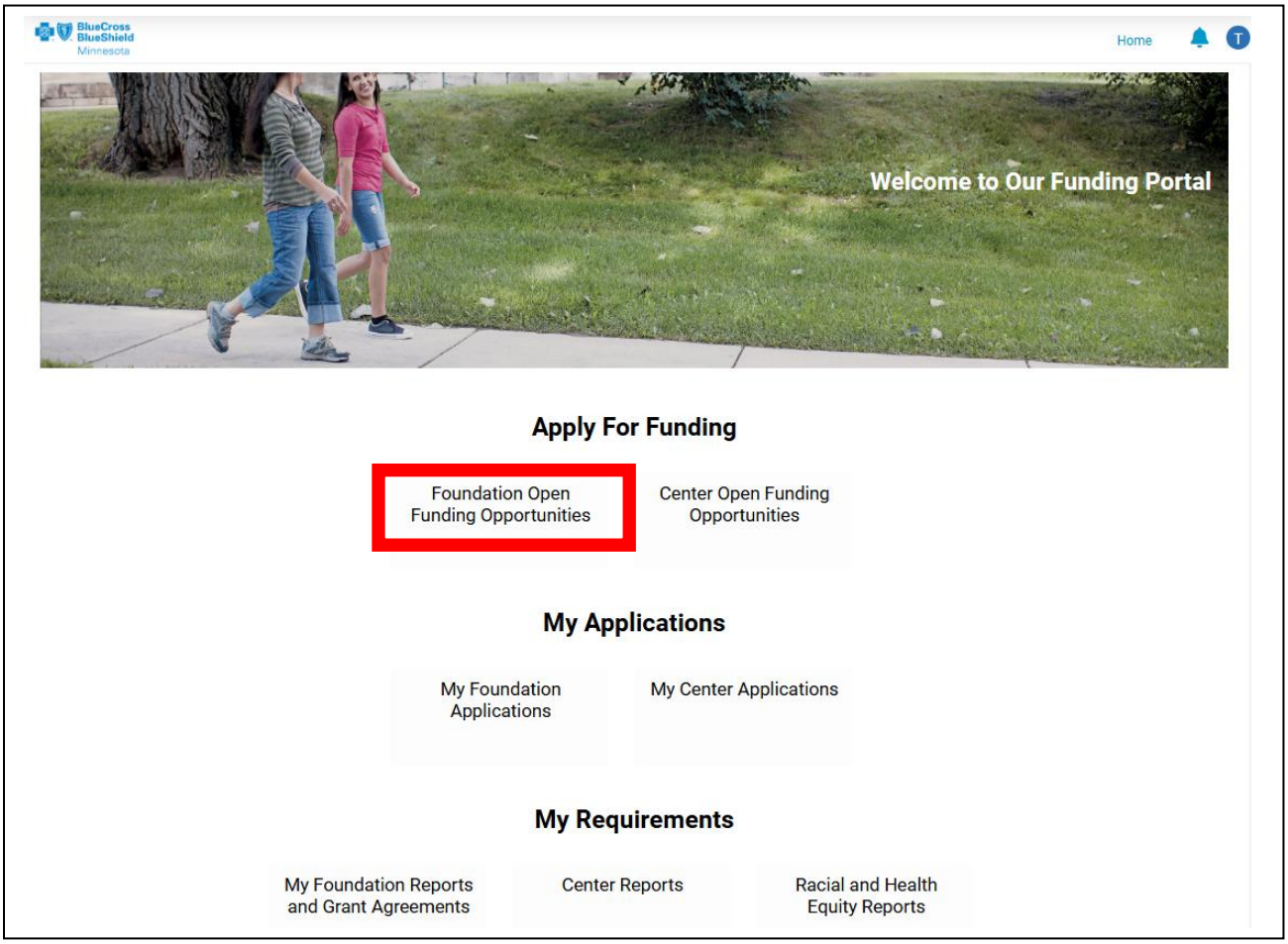
Profile

To change your password or update your personal or organization profile details, click on the circle at the top right side of the page.



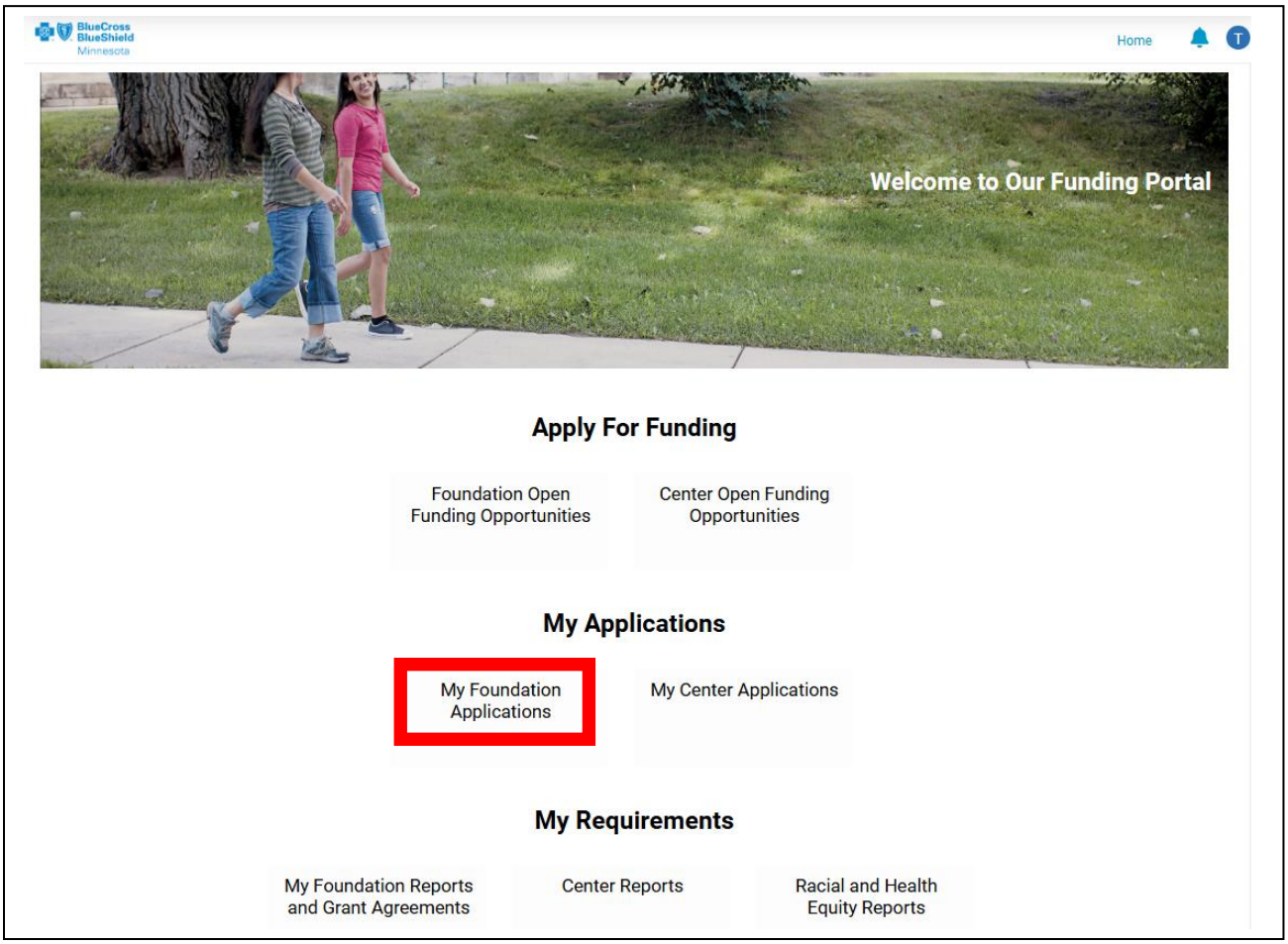
Apply for Funding

If the Foundation has an open funding opportunity available, the application will be available in the **Foundation Open Funding Opportunities** section. Click on Foundation Open Funding Opportunities to start an application.



My Applications

Click on **My Foundation Applications** for a list of applications you have started and/or submitted.



Applications are grouped in these categories:

In Progress: Applications you have started but not yet submitted, as well as any application for which the Foundation has invited you to complete.

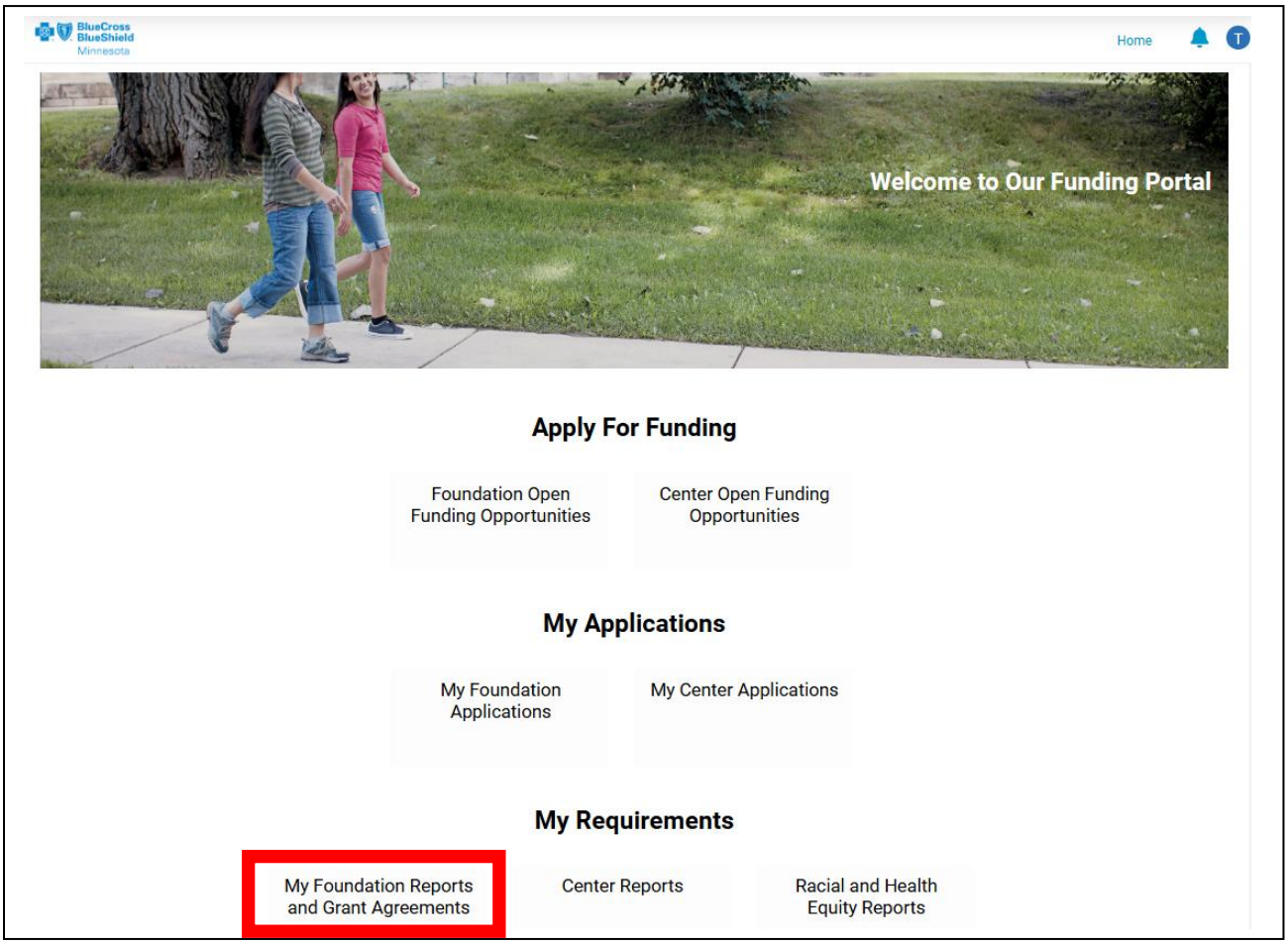
Under Review: Submitted applications that are being reviewed by the Foundation or that have been sent back to you for additional information.

Awarded: Active grants.

Closed: Approved grants that are no longer active; declined applications; and withdrawn applications.

My Requirements

If you have been awarded a grant, click on **My Foundation Reports and Agreements** to view your grant agreement, scheduled grant reports, and submitted grant reports.



Requirements are grouped in these categories:

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: You can complete and submit your Scheduled grant reports (i.e., Progress Reports and/or Final Reports) from this section.

Report History: You can view your Submitted grant reports (i.e., Progress Reports and/or Final Reports) from this section.

Application Process

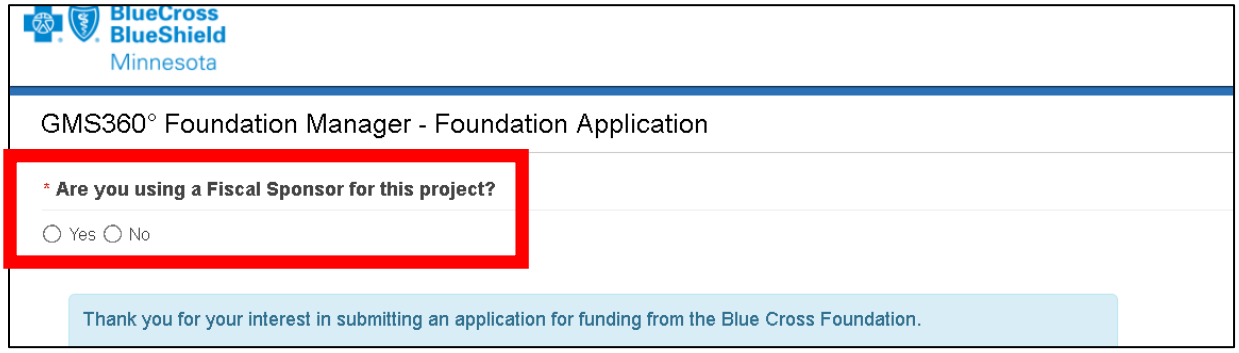
Completing Your Application

- Applicants must complete the eligibility questionnaire preceding an application for an open funding opportunity. After submitting the questionnaire, you will receive confirmation of whether you are eligible to apply.
- You will then be asked if you are using a fiscal sponsor for your project. Select Yes or No when prompted. If you select Yes, please see the **Using a Fiscal Sponsor** instructions below.
- 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, 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, click 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, click **Submit**.
- You will receive a confirmation email when you submit your application.

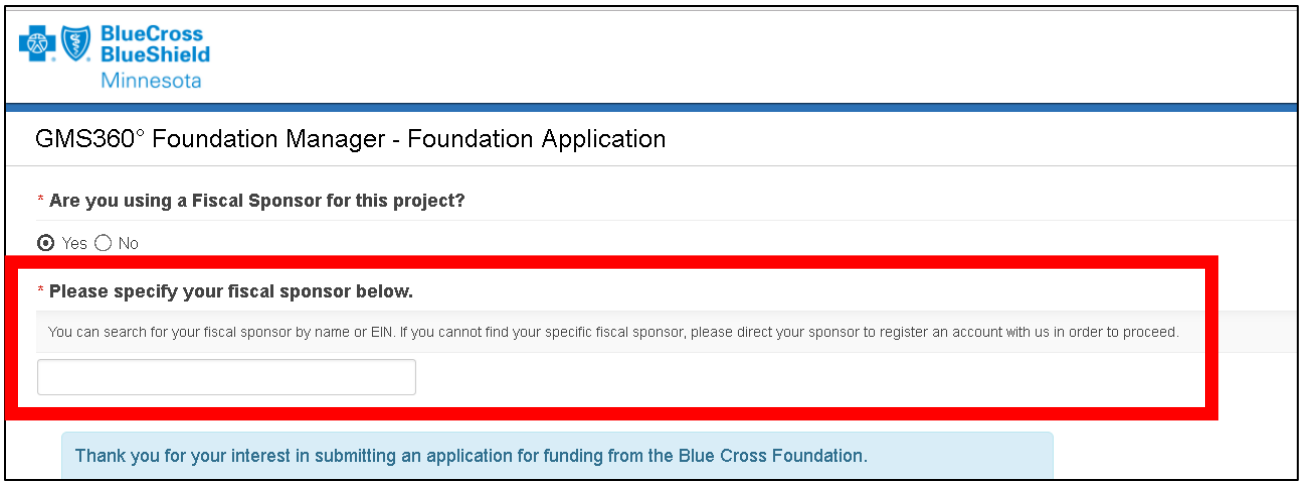
Using a Fiscal Sponsor

If you are using a fiscal sponsor for your project, you must first register your own organization in our online funding portal and create yourself as a contact under the organization you created. See the **Getting Started >> New Users** section above for instructions.

When you begin the application, select **Yes** when asked if you are using a Fiscal Sponsor.



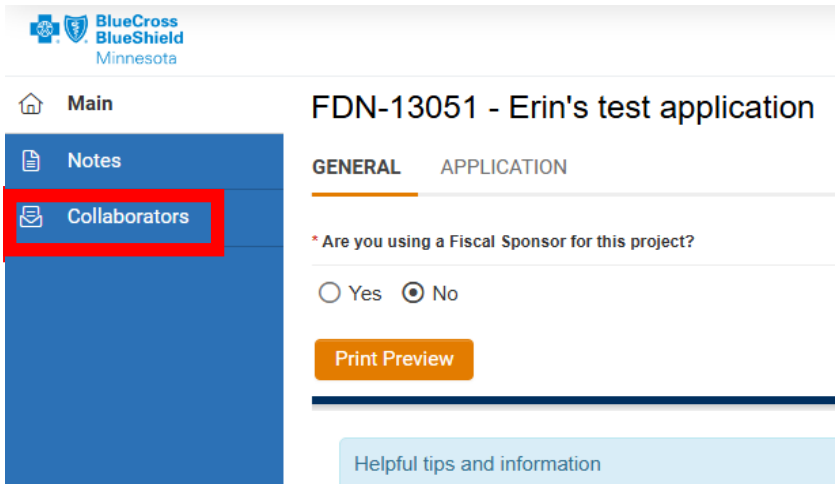
You will then be prompted to search for your fiscal sponsor in our system by entering their legal name or EIN number. **If you do not find the fiscal sponsor in our system, ask the fiscal sponsor to register their organization by visiting https://bcbsmn.smartsimple.com/s_Login.jsp.** Once they have registered, you can go back and add them as the fiscal sponsor to your application.


BlueCross BlueShield Minnesota
GMS360° Foundation Manager - Foundation Application
* Are you using a Fiscal Sponsor for this project?
Yes No
* Please specify your fiscal sponsor below.
You can search for your fiscal sponsor by name or EIN. If you cannot find your specific fiscal sponsor, please direct your sponsor to register an account with us in order to proceed.
Thank you for your interest in submitting an application for funding from the Blue Cross Foundation.

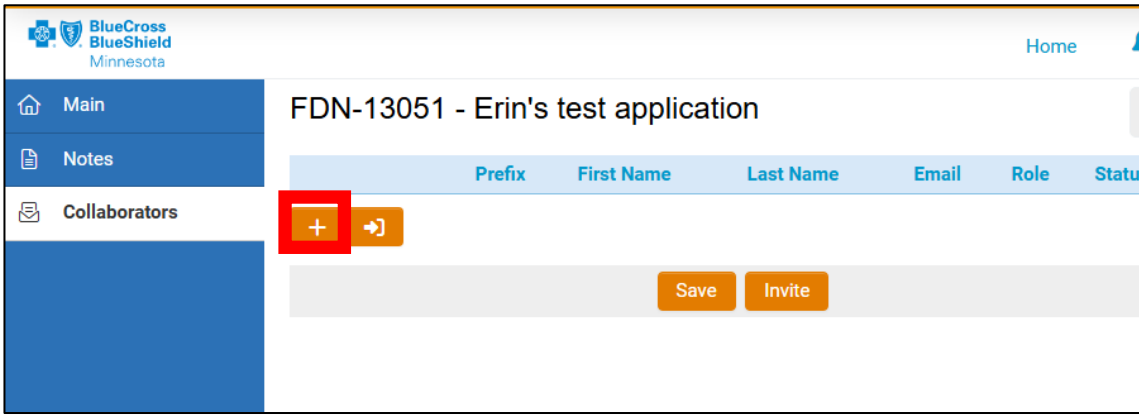
Inviting a Collaborator

You may invite other individuals to review or edit your application. These collaborators can be within or outside of your organization. Please note, adding a collaborator will provide them with access to your full application (as well as grant reports, if you are awarded a grant).

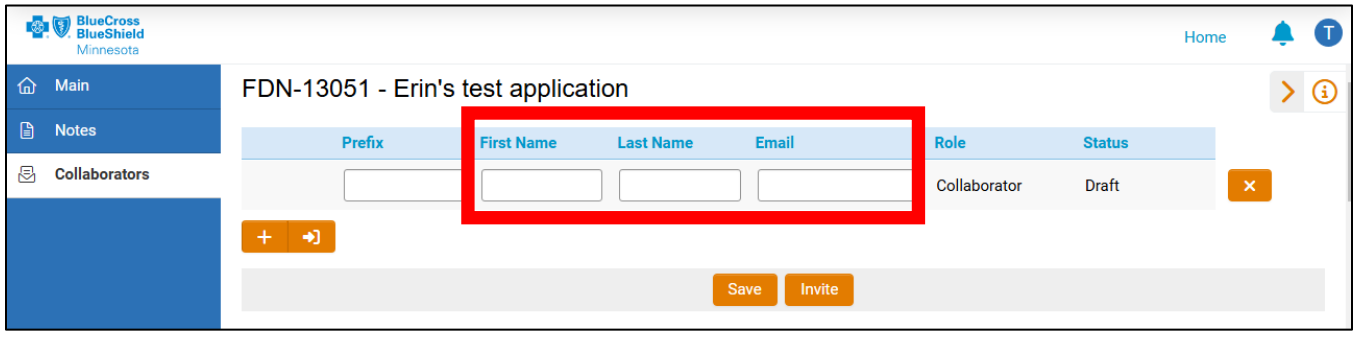
Once you have started your application, click on **Collaborators** on the left side of the screen:



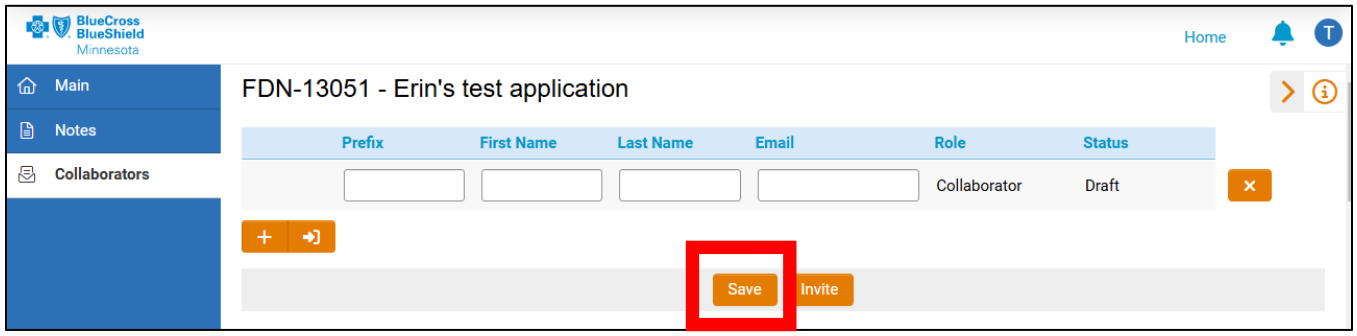
Click the **plus sign:**



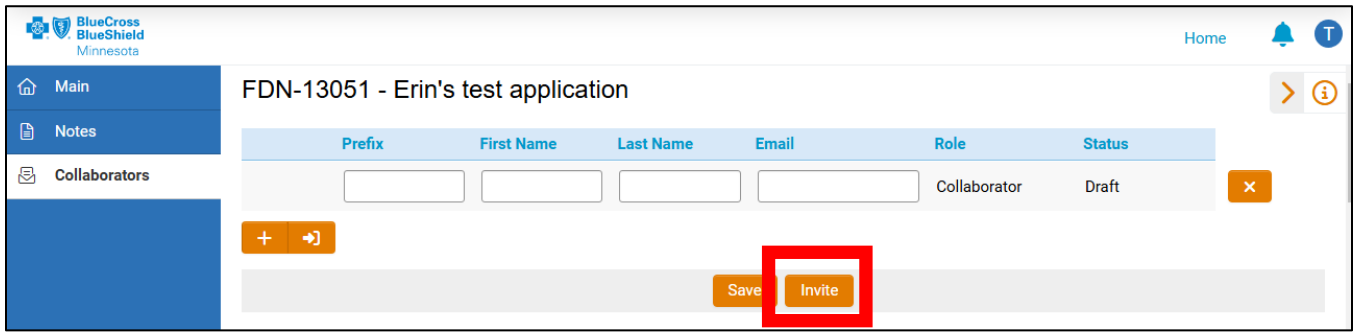
Enter the Collaborator's **first name, last name, and email address**:



Click **Save**:

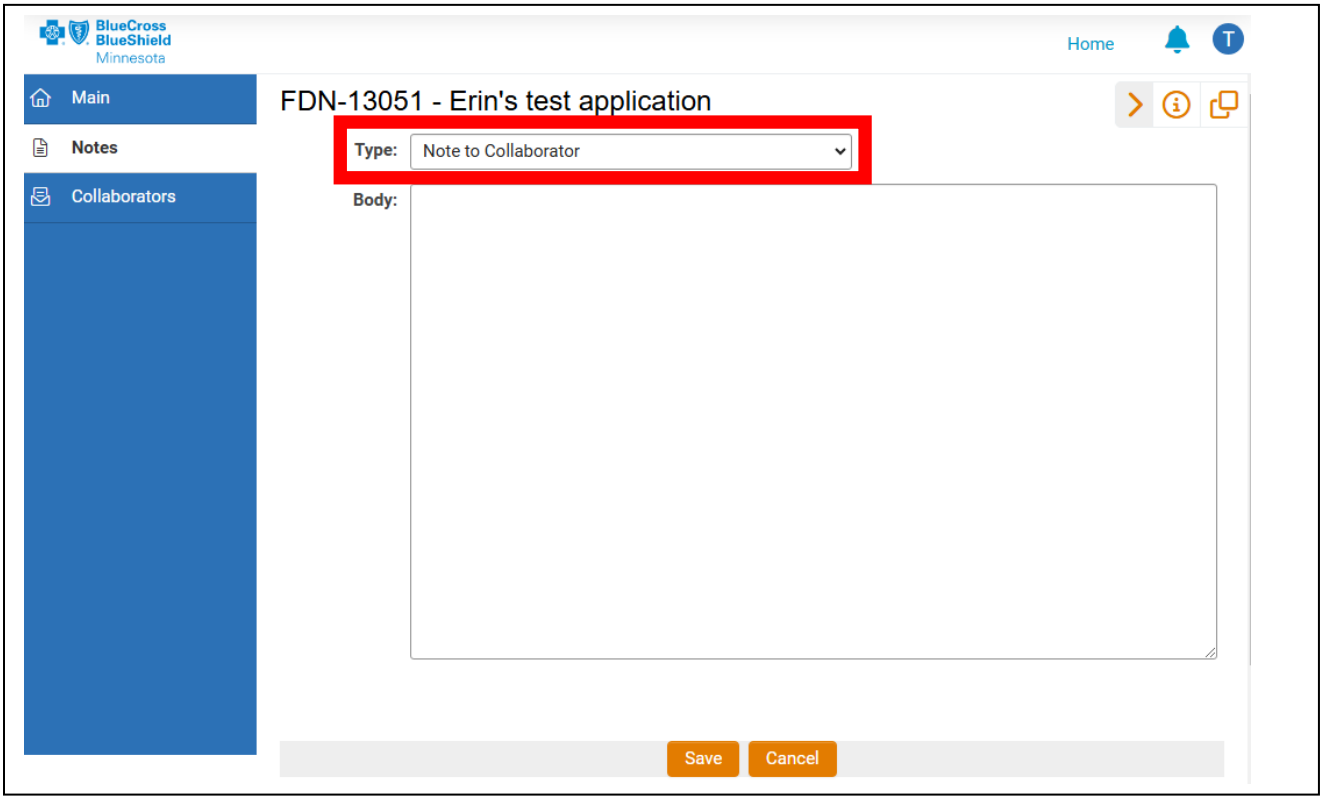


Then click **Invite**:



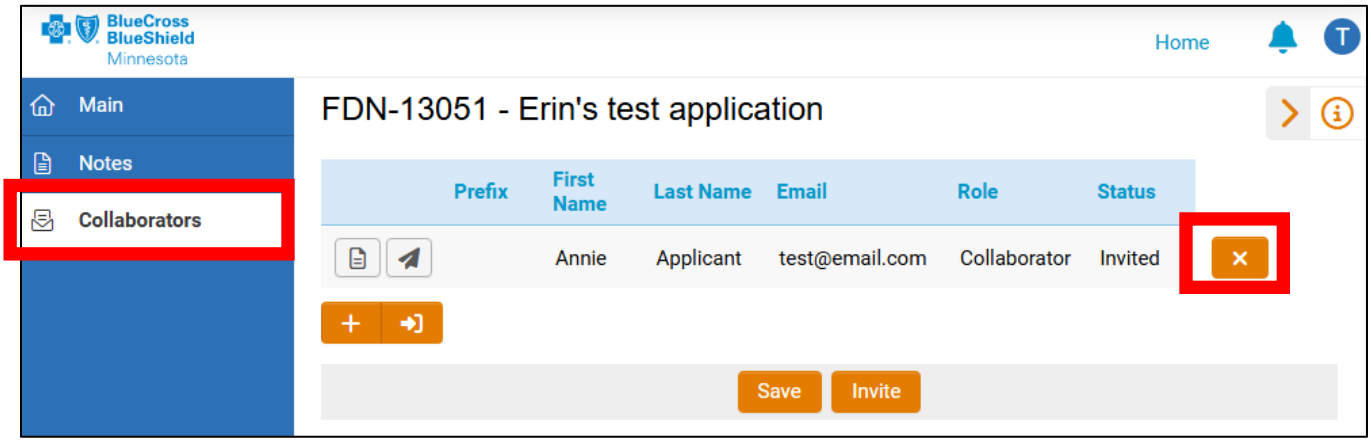
The collaborator will receive an email asking them to accept or decline the invitation. When they accept the invitation, the collaborator will receive a link to sign into the online funding portal to access the application. Note: If they already have an account, they should log in using their current email and password. If they do not have an existing account, 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 **My Applications >> My Foundation Applications >> In Progress**.

You can communicate with your collaborator(s) within your application by using the Notes tool on the left side of the screen. Select **Note to Collaborator** from the "Type" drop-down menu. Enter your note in the Body field and click Save. The collaborator needs to access the application to see these notes; they will not be notified automatically that a note has been entered. Note: Foundation staff will not be able to view these Notes to Collaborators.



To remove a Collaborator:

- From your application, click on the Collaborators tab on the left sidebar.
- Click on the X to the right of the collaborator's name.

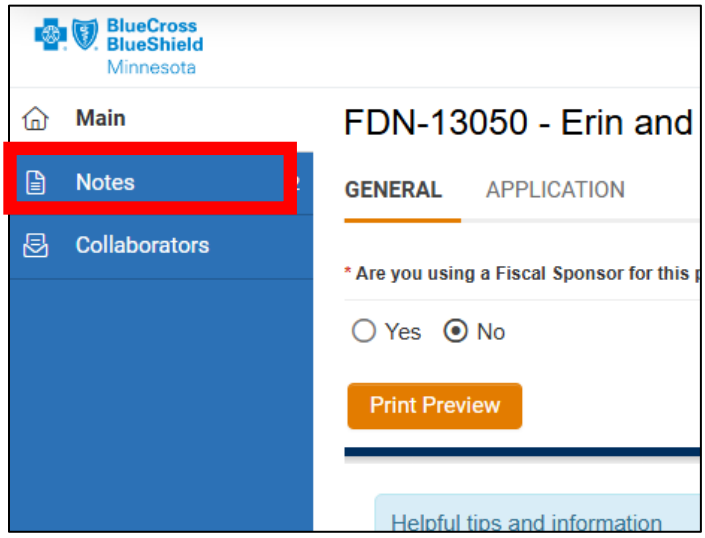


Using the Notes Feature

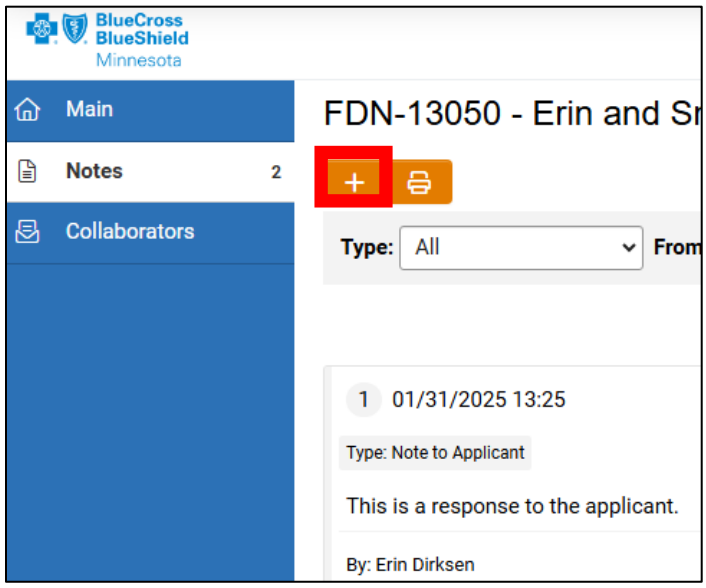
In your application you will see a Notes tab on the left side of the screen. You will be able to read messages from Foundation staff and send messages back to Foundation staff as needed.

If Foundation staff send you a note, you will receive an email that contains the contents of the note and instructions on how to log into the portal to respond to the message in the Notes tab.

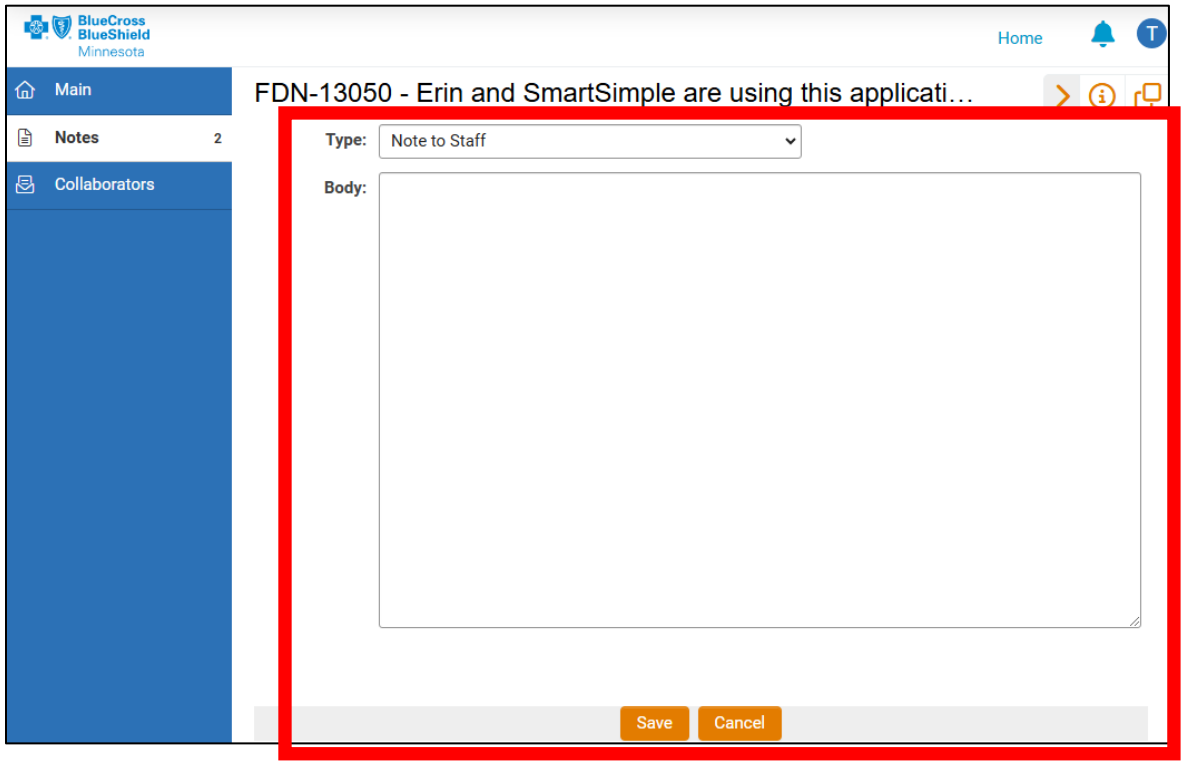
To read the message, click on the **Notes** tab on the left side of your application:



To respond to the message, click on the **plus sign**:



Select **Note to Staff** from the Type drop-down menu, type your message, and click **Save**. The message will be sent to Foundation staff.



You can also use the Notes feature with Collaborators on your application. See the **Inviting a Collaborator** section above.

Approved Applications

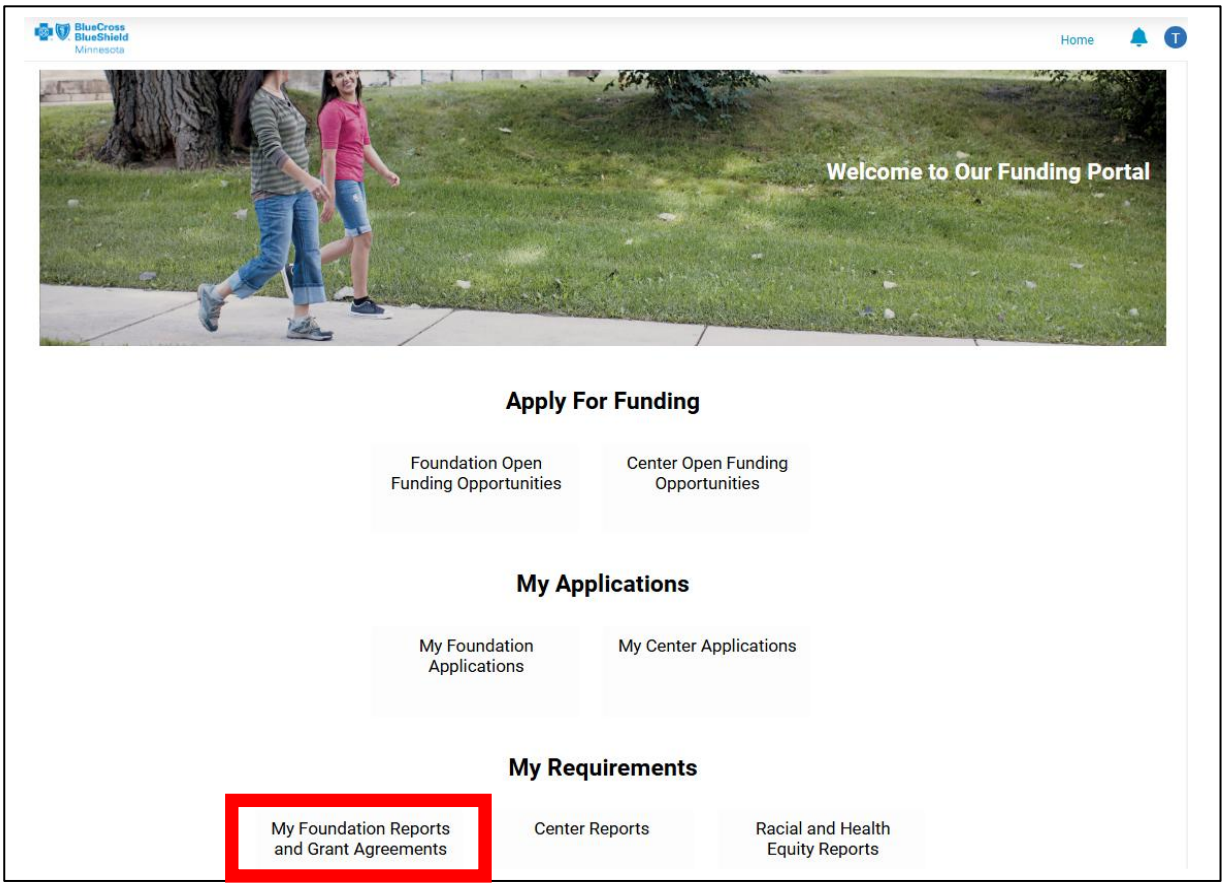
Notification

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

Grant Agreement

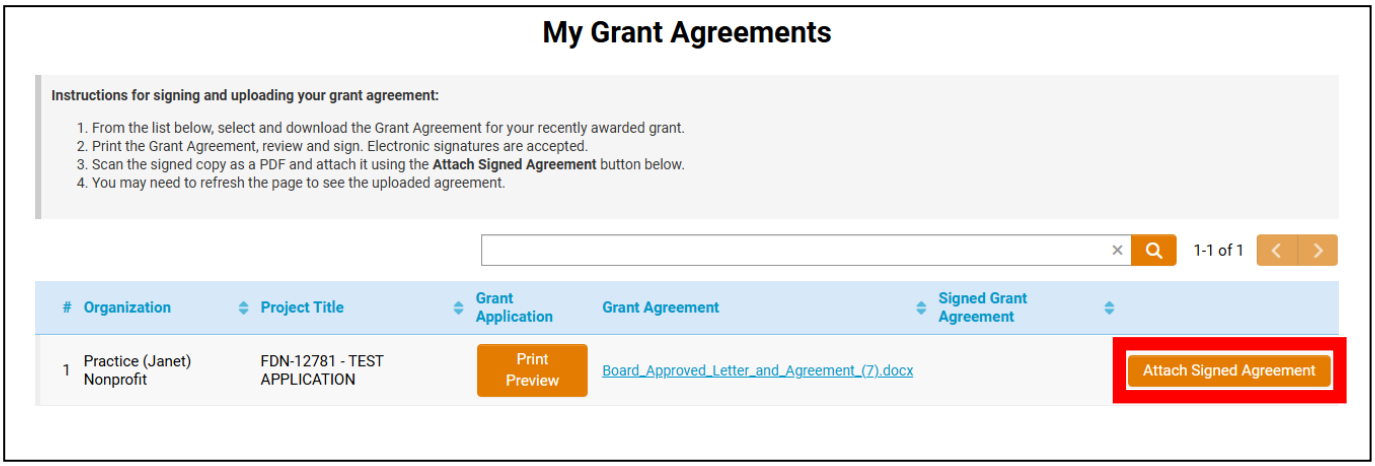
Next, the Foundation will prepare a grant agreement and upload it to your portal. You will be notified via email when the agreement is ready for you to review, sign, and upload back into the portal. Please be sure to check your spam/junk folder for notification emails.

The agreement will be located under **My Requirements > My Foundation Reports and Grant Agreements:**



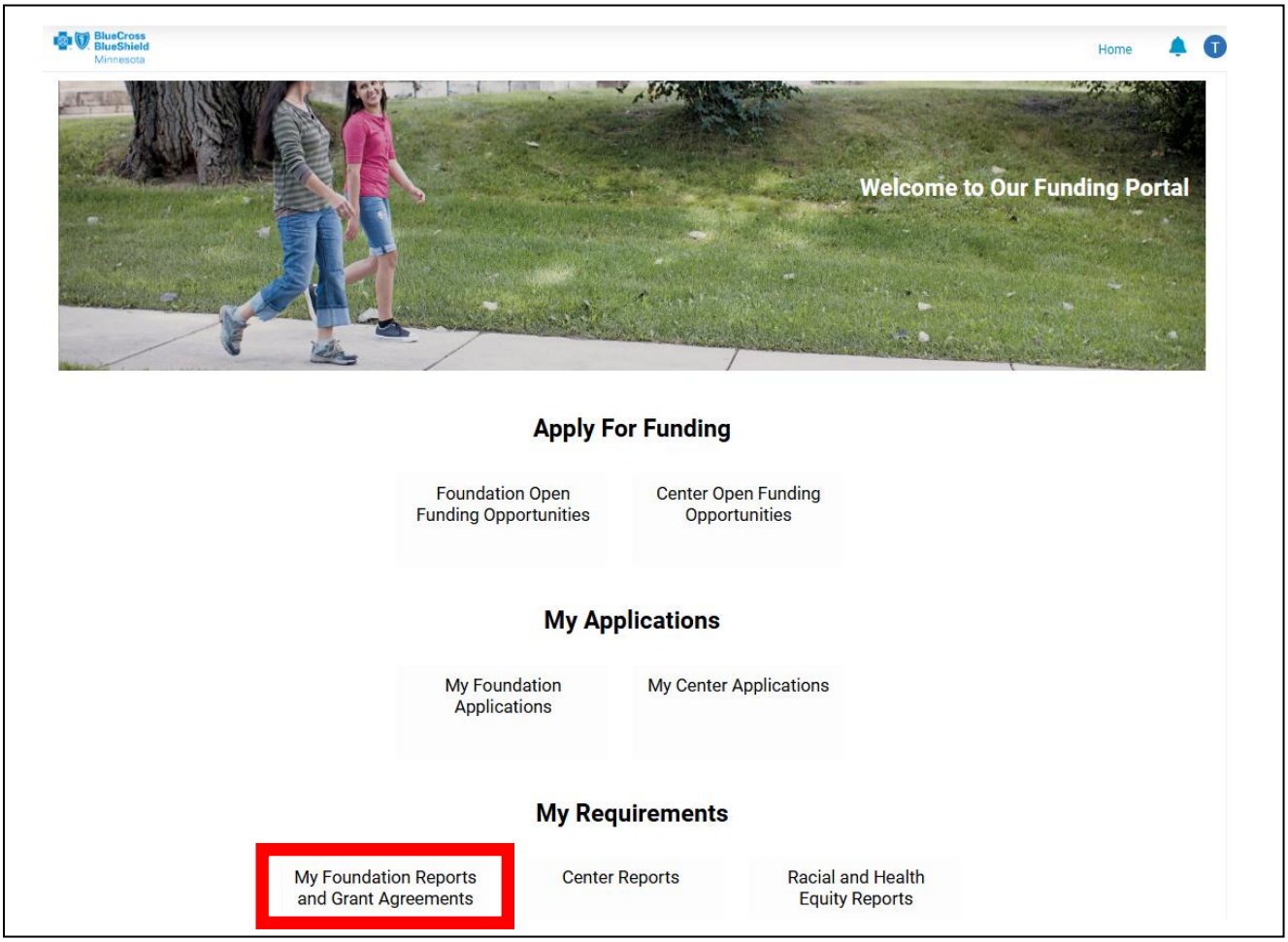
Instructions for signing and uploading your grant agreement:

1. From your portal, click on My Foundation Reports and Grant Agreements.
2. From the Grant Agreement section, select and download the grant agreement for your recently awarded grant.
3. Print the grant agreement, review, and sign. Electronic signatures are accepted.
4. Scan the signed copy as a PDF and upload it using the **Attach Signed Agreement** button below.



Progress Reports and Final Reports

Any required progress report or final report for your grant will be available in your portal under **My Requirements > My Foundation Reports and Grant Agreements**. Please note: you will receive report reminder emails as each report due date approaches.



After clicking on **My Foundation Reports and Grant Agreements,** click on the **Reports Due** category.

Click on the **Application Name** to view and complete the report form and upload the required budget documents.

Click on the **Submit** button when you are ready to submit your report and required budget documents to the Foundation.

You will receive a confirmation email upon submission of your report.

Declined Applications

Notification

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 check your spam/junk folder for notification emails.

For additional assistance using our online funding portal, please email or call:

Erin Dirksen, Grants Management and Operations Administrator
erin.dirksen@bluecrossmnfoundation.org
651-662-9511

or

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