

# Guidance on how to use SM Apply to apply to RISE<sup>1</sup>

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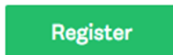
## 1. How do I register as an applicant

### 1.1. I do not have an account yet within the site

#### **How to Register**

If registration is open to the public:

1. Click **Register**



2. Choose to Register using a **Social Media Account** (Facebook, Google, Twitter)  
OR  
Choose to Register to **SurveyMonkey Apply**
3. Selecting a Social Media Account redirects to that platform to complete your registration  
Selecting to register to SurveyMonkey Apply directs to the SM Apply Registration page.
4. Click **Create Account**

#### **Required Information**

- First Name
- Last Name
- Email
- Password/Confirm Password

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<sup>1</sup> This guide is based on [SM Apply FAQ & troubleshooting](#) and has been adapted to include RISE specific requirements and characteristics.

- Complete the Captcha

## **Registration Errors**

Here are potential errors you could experience while registering:

### **Missing Required Information**

To register for the site, complete all required fields within the registration form. If you have difficulty registering, check for this warning in regards to a missing field:

Last name

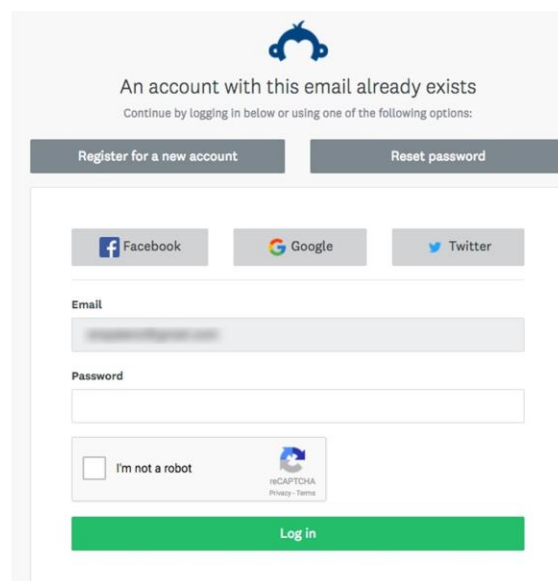
! Please fill out this field.

## **1.2. Account Already Exists**

When you register or are invited to a SurveyMonkey Apply site, an account gets created for you within the SM Apply database. Once registered within one site you will need to re-register using the same password and credentials as the existing account.

If this is the case, then a message appears that "An account with this email already exists." You will then be prompted to:

- Register with a new account.
- Reset your password.
- Complete the registration with that account.



An account with this email already exists

Continue by logging in below or using one of the following options:

Register for a new account    Reset password

Facebook    Google    Twitter

Email

Password

☐ I'm not a robot    reCAPTCHA

Log in

### 1.3. Edit your account settings

For more information on how to reset or change your password, your name, email address, timezone and preferred language, please visit SM Apply FAQ [here](#).

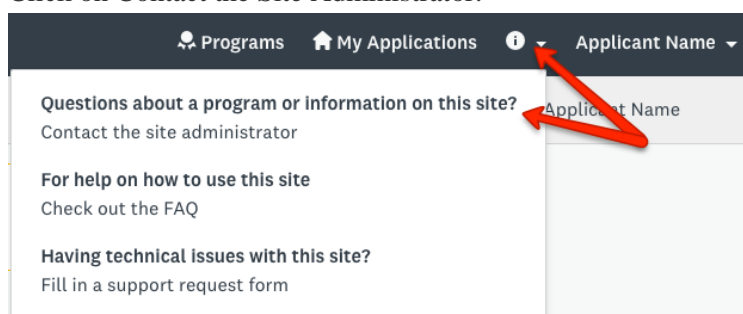
## 2. Who do I contact for support

In the event you need support with your application, you need help with the site or you have technical issues you can contact the administrators of the site, check the Frequently Asked Questions (FAQ) or reach out to developers for technical support.

### Contact administrators

To contact the administrators of the site:

1. Go to the Home Page or Log in to your Account.
2. Click on the Information (i) icon.
3. Click on Contact the Site Administrator.



The administrators are responsible for configuring SurveyMonkey Apply to suit their own needs. Any forms, deadlines, or emails are customized by them. So, they will be the best ones to answer many of your application process questions. Your default email application will open for you to compose your email.

### Learn how to use this site

To know more about how to use SM Apply, you can refer to [Applicant, Recommender, and Reviewer FAQ](#).

### Contact SM Apply Support team for technical issues

Check the FAQ or contact the administrators of the site to confirm your issue is a technical issue. You can reach out to our helpful SM Apply Support team via Email to receive further help.

They will be able to provide help with troubleshooting your issue. Please provide as much information as possible, including attachments, links, and screenshots.

For more information on how to contact our Support team, you can refer to [Email Support: For Applicants, Reviewers, and Recommenders](#).

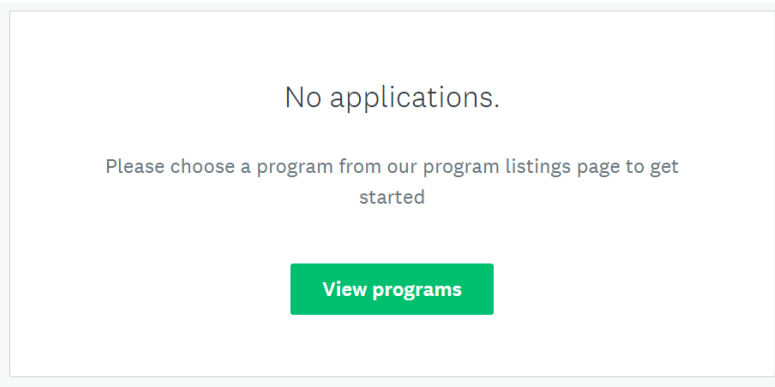
### 3. How do I complete my application for RISE

#### 3.1. How do I create a new application?

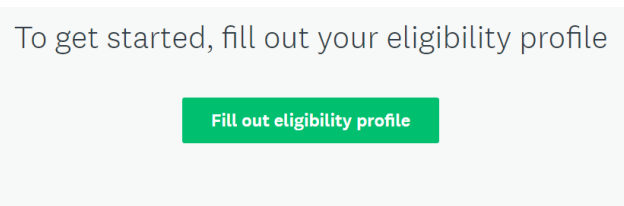
##### **I haven't created an application yet**

If you have no Applications created yet, within the site you can:

Click **View Programs**.



You will need to complete an Eligibility Quiz before creating your application.

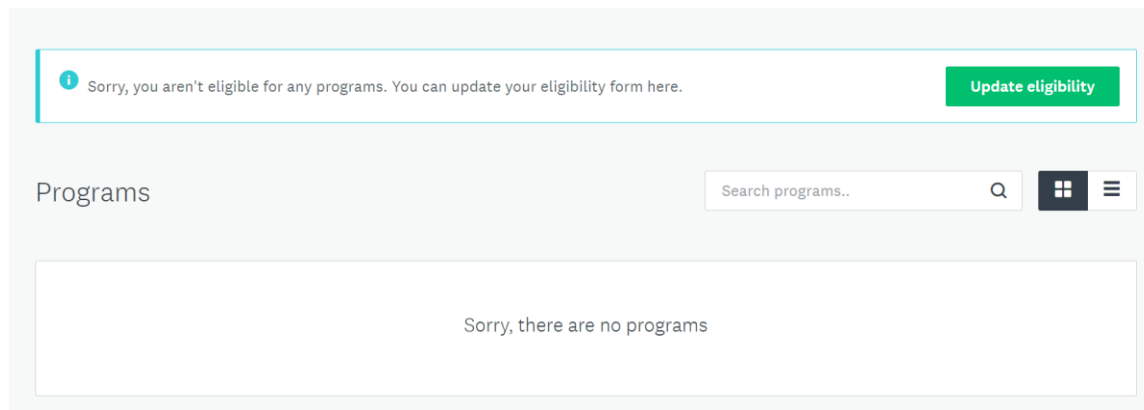


Once you've completed the eligibility quiz, you will be able to View the programs.

Click **MORE** > for the program you wish to apply for.

Click **Apply**.

If you see the following, that means you are not eligible to apply to RISE and you are not able to create an application for the program.



If you experience difficulties creating an application, you can [reach out to the administrators of the site](#).

### **I have existing applications on the site**

In the case where you have already created an application on the site and wish to create a new one:

1. Click **Programs** in the top in the top right corner.



2. Click **MORE** > for the program you wish to apply for.
3. Click **Apply**.

RISE applicants are able to submit more than one application. Note that an organisation can submit an unlimited number of different proposals under this call as lead applicant and/or co-applicant during the application window. Nonetheless, an organisation can only be awarded one grant as lead applicant.

If you're experiencing difficulties creating more than one application, you can [reach out to the administrators of the site](#).

## **3.2. How do I invite others to collaborate?**

SM Apply allows you to add collaborators to your applications. You need to verify your email address to enable this feature (see section 3.7). Once you have created your applications, in your application page:

1. Click **Add collaborator** in the navigation panel on the left

0 of 1 tasks complete

Last edited: May 18 2022 10:31 AM (EDT)

REVIEW SUBMIT

Deadline: Jul 18 2022 11:59 PM (EDT)

(Owner)

Add collaborator

2. Write the **email address** of all the collaborators you want to add
3. Select the **type of access**: view & edit or view only
4. Write a personalized message (optional)
5. Click **Send Invite**

### 3.3. How do I fill in my RISE application?

When you start a new application you will be asked to name your application. The name can be the title of the proposed project, the name of the lead organisation and/or partner organisations or any other name that you wish your proposal to be identified with.

The application to RISE call for proposals 2022 is divided into 11 tasks. When you open a new application you will only be able to see the first task. Once that task is completed, you will be able to see all the tasks.

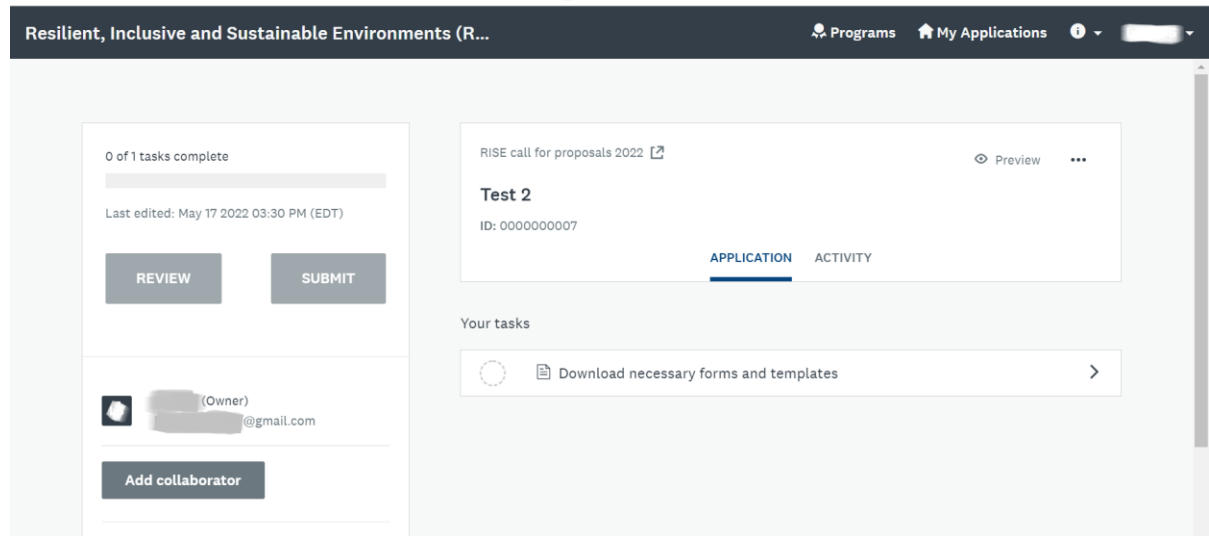
Your tasks

	Download necessary forms and templates	>
	Acknowledgements	>
	Lead applicant contact Information	>
	Lead applicant basic information	>
	Applicant eligibility	>
	Environment and social impact assessment	>
	Technical proposal	>
	Upload proof of registration	>
	Upload RISE declaration	>
	Upload activity plan	>
	Upload budget	>

### **Task 1: Download necessary forms and templates**

The first task you need to fill in when you start an application for RISE call for proposals 2022 is the **Download necessary forms and templates** by performing the following next steps:

1. Click on **Download necessary forms and templates**












The screenshot shows a web application interface for 'Resilient, Inclusive and Sustainable Environments (RISE)'. The top navigation bar includes 'Programs', 'My Applications', and a user profile icon. The main content area is divided into two panels. The left panel, titled '0 of 1 tasks complete', shows a progress bar, the last edited date 'May 17 2022 03:30 PM (EDT)', and buttons for 'REVIEW' and 'SUBMIT'. Below this is a section for the user, labeled '(Owner)' with an email address ending in '@gmail.com', and an 'Add collaborator' button. The right panel displays the 'RISE call for proposals 2022' application, specifically 'Test 2' with ID '0000000007'. It has tabs for 'APPLICATION' and 'ACTIVITY'. Below the tabs, a 'Your tasks' section shows a single task: 'Download necessary forms and templates', which is currently in progress, indicated by a circular progress icon and a right-pointing arrow.

2. Select the **language** in which you want to download the forms and templates.
3. Click on the three documents, one at a time, to **download** them. They will open on a new window.
4. **Save** the document.
5. Once you have downloaded the three documents, **check the three boxes** below to confirm.
6. Select **Mark as Complete**.
7. To download the templates and forms in another language once you have marked as complete this task, go to **More options** icon (...) in the top right corner of the application and select **edit**. Make sure to follow the steps indicated above and mark the task as complete again.

### **Tasks 2 to 7: Fill in the application form**

Tasks 2 to 7 contain a series of questions and spaces for you to complete:

1. **Fill in** all the required information. SM Apply automatically saves all your responses. You can also click Save & Continue editing after you have filled in each task page.
2. You can leave a task partially completed at any time. Use the navigation panel on the left to go to another task or back to your application page.
3. Once you have answered all the questions in a task, click **Mark as Complete**. The system will indicate if there are any errors or missing items.
4. **Check** that your task has been completed in the navigation panel on the left or on the main page of your application.

Your tasks		
	Download necessary forms and templates Completed on: 31 May 2022 10:15 AM (EDT)	>
	Acknowledgements Last edited: 31 May 2022 10:15 AM (EDT)	>
	Lead applicant contact information Completed on: 31 May 2022 10:16 AM (EDT)	>
	Lead applicant basic information	>
	Applicant eligibility	>
	Environment and social impact assessment	>
	Technical proposal	>
	Upload proof of registration	>
	Upload RISE declaration	>
	Upload activity plan	>
	Upload budget	>

It is recommended that you complete the tasks in the order established in the application. Especially as your environment and social impact assessment (task 6) should inform your technical proposal (task 7). You can always go back to previous tasks and edit them before submitting your application.

### **Task 8: Upload proof of registration**

You are required to upload the proof of registration of the lead applicant and partners. Proof of registration of the lead applicant is required at this stage. Proof of registration of all partners will be required at the pre-award and due diligence stage, but it is recommended to upload it at the application stage, if available.

1. Select **attach file**.
2. **Upload** a proof of registration. Documents such as a copy of the registration document, the articles of association or articles of incorporation, but also other documents as applicable under the local regulations of the country of registration may serve as proof of existence and registration as a legal entity.
3. You can upload multiple documents one by one or in bulk. Documents accepted include PDFs, Word, images, PPT and excel. It is recommended that the proof of registration is uploaded as a PDF to facilitate its review.
4. Click **Mark as Complete**.

### **Task 9: Upload applicant declaration**

In task 9, the system will require you to upload a signed copy of the declaration form that you downloaded at the beginning in task 1 in English or Spanish. You can always go back to task 1 and download the document again in the preferred language:

1. **Download** RISE declaration form.
2. After reading it, **fill in** the declaration form and **sign it** at the bottom of the document. You can do it virtually or by hand.
3. **Upload** a copy or scan of the signed RISE declaration form.

#### **Task 10: Upload activity plan**

Applicants are required to upload an activity plan to compliment their technical proposal. The template is provided in task 1.

1. **Download** RISE activity plan template.
2. **Fill in** the RISE activity plan template following the guidance and indications in the template.
3. **Upload** a copy of your RISE activity plan.

It is recommended that you follow the format proposed in the template.

#### **Task 11: Upload budget**

Applicants are required to upload a budget to compliment their technical proposal. The template is provided in task 1.

1. **Download** RISE budget template.
2. **Fill in** the RISE budget template following the guidance and indications in the template. The template includes formulas to help you calculate totals. Do not change the formulas in the budget unless to add additional rows to the formula.
3. **Upload** a copy of your RISE budget.

#### **Why do I get an error when uploading a file?**

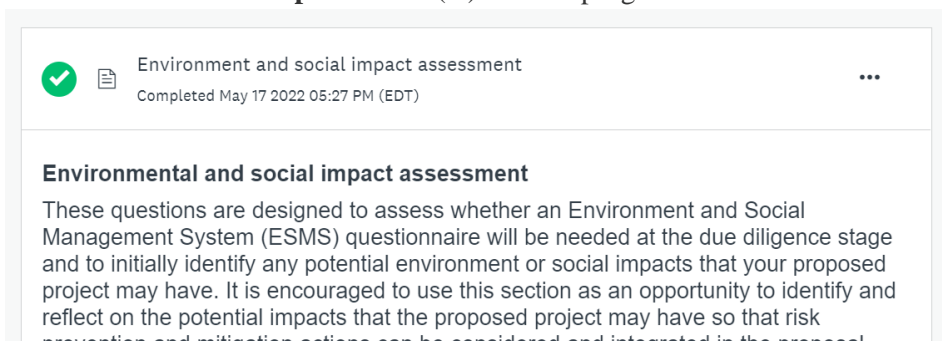
There are a few potential reasons why you may experience issues uploading your file:

1. **The file isn't in an available format.**  
Check to ensure that the file type you're trying to upload matches the requested formats.
2. **The file doesn't meet size restrictions.**  
Check to ensure that the file type you're trying to upload does not exceed the maximum file size of the upload task.
3. **You're attempting to Upload more files than allowed**  
Confirm that the number of files you're uploading is within the range of the minimum and the maximum number of files required.
4. **The file is encrypted**  
SurveyMonkey Apply won't accept encrypted files. To upload your file, it will need to be unencrypted.
5. **The file is corrupted**  
It is possible that the file you're trying to upload is a corrupted file. To resolve the issue, **re-save the file to a new folder** on your computer and attempt to upload the file again.
6. **A task related issue.**  
Depending on the issue it's also possible that the error is related to another Setting on the task.

### 3.4. How do I edit a completed task?

If you have previously pressed Marked as Complete on a form, but have not yet Submitted your application, you can choose to make Edits to your task.

1. Enter your application
2. Click on the task you wish to edit
3. Click on the **More Options** icon (...) in the top right corner of the task



4. Click **Edit**
5. Click **Previous/ Next** to navigate between the pages (if any) and make your changes
6. When done, navigate to the last page (if applicable) and press **Mark as Complete**

#### Why can't I edit my task?

If your tasks **Cannot be Modified** or say **The task cannot be started at this time**, there are a few main reasons why this could occur.

1. The deadline has passed or the administrators don't want you to start until a specific date.
2. Your application is locked. See how to solve other technical issues refer to SM Apply [Applicant, Recommender, and Reviewer FAQ](#).

[Contact the administrator of the site](#) if you aren't able to edit a task and wish to understand why.

### 3.5. How can I print/download my online application?

There are three ways to print/download your application within the site:

#### From the "My Applications" Page

1. Click on the **More Options** icon (...) in the top right corner of the tile of the application you wish to download
2. Click **Download**

#### From Within the Application

If you're on the application page with the list of Tasks to complete, to download your application:

1. Click on the **More Options** icon (...) in the top right corner of the application.

2. Click **Download**

You can also download separate tasks clicking on the More Options icon (...) in the top right corner of the task.

#### **From the Preview**

1. Within the Preview, click **Download** in the top right corner

### **3.6. How do I preview my application?**

There are two ways to Preview your application within the site:

#### **From the My Applications Page**

1. Click on the **More Options** icon (...) in the top right corner of the tile of the application you wish to Preview
2. Select **Preview**

#### **From Within the Application**

If you're on the application page with the list of Tasks to complete, to preview your application:

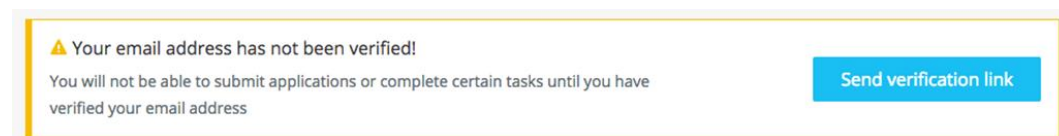
1. Click on the **More Options** icon (...) in the top right corner of the application.
2. Select **Preview**

It is highly encouraged that you review your application prior to submission as edits will not be accepted once the application is submitted. If you want to edit the application after submission, you will need to create a new application and delete the previous one (see 3.8 on how to delete your application).

### **3.7. How do I submit my application?**

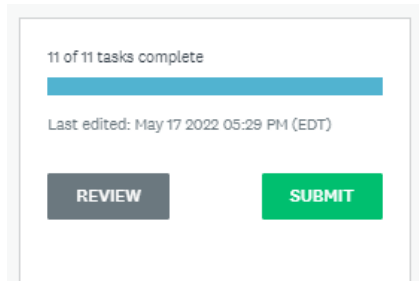
To be able to submit your application you will first need to complete all required tasks within your application. Additionally, you will need to ensure that you've verified your email.

A Banner will appear within your portal until you've verified your account. Click to **Send Verification Link** and follow the instructions sent in the email.



Once all tasks are complete, submit your application by performing the following steps:

1. Go back to the application main page. At the top left you will see the **Review** and **Submit**



2. **Review** application materials
3. Once you have reviewed all your completed tasks, you can click to **Submit Your Application**.
4. Choose to proceed back to your applications or View More Programs.

### 3.8. How do I delete my application?

If you have started the application but no longer wish to continue, you can choose to delete your application.

You will not be able to delete a submitted application. You will need to contact the administrators of the site for further help in regards to this.

There are two ways to Delete the application:

#### **From the "My Applications" page**

1. Click on the **More Options** icon (...) in the top right corner of the tile of the application you wish to delete
2. Select **Delete**
3. You will receive the confirmation message "**Are you sure you want to delete your application? You won't be able to undo this action**"
4. Click **Yes** to confirm

#### **From Within the Application**

If you are on the application page with the list of Tasks to complete, to Delete your application:

1. Click on the **More Options** icon (...) in the top right corner of the application.
2. Select **Delete**
3. You will receive the confirmation message "**Are you sure you want to delete your application? You won't be able to undo this action**"
4. Click **Yes** to confirm

### **3.9. Confirmation email**

A confirmation email is part of the configuration of the site set by the administrators. If you submit your application and haven't received an email, check your spam/junk folder. If you still aren't able to find the email, [contact the administrators](#) to confirm if one was sent.

You can also refer to [I am not receiving any emails from the site](#) for more information.