

HCTF Online Grant Reporting System: Survey Apply

Frequently Asked Questions (FAQ)

NEW for approved 2021-22 proposals onward, applicants will submit their grant reports via the new Survey Apply online grant management system. The deadline to submit your grant reports is April 15th, 2022.

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General FAQ

1) How do I access HCTF’s Survey Apply site?

Click this link to apply report online: [Survey Apply Application System](#)

2) I forgot my password, what should I do?

You can reset your password by going to the applicant login page and clicking **Forgot your password link**, enter your email address to have your username sent to the email address on your account or enter your username to reset your password. Be sure to add grants@hctf.ca to your “safe senders” list. If you do not receive an email, check your spam and junk mailboxes to see if the email was routed there.

3) Do I need to use the online system, or can I submit my grant report another way?

If you are completing your grant report for Enhancement and Restoration Grants, Caribou Habitat Restoration Grants, or Stewardship Grants, for **the 2021-22 funding year or later**, you can do so only through the new Apply system.

If your project is from an earlier grant year (before 2021), you must submit your grant report via email to reporting@hctf.ca (Note that reports for projects submitted from 2021-22 or later will not be accepted via email). If you require a copy of the reporting template for projects approved prior to 2021, please email reporting@hctf.ca.

4) Will the system time-out if it’s been inactive for a period of time?

The system doesn’t have a set time-out period, but you should always save if you need to pause completion of your report.



5) Does the new system work on any browser?

We recommend using Chrome for best results.

6) How do I ensure emails are received from SurveyMonkey Apply?

Allow-listing emails ensures that any emails sent from SurveyMonkey Apply are correctly delivered to your inbox. If you are having trouble receiving emails from an Apply site:

- Check to see if **noreply@mail.smapply.net** has been added as a safe sender on your email inbox.
- If you have a custom domain, for example under your organization or school, we recommend reaching out to your IT department to ensure the emails are not being blocked on a domain level.

You can provide your IT department with the following email addresses to be allowlisted/added to safe sender lists:

- grants@hctf.ca
- educationgrants@hctf.ca
- noreply@smapply.net
- noreply@mail.smapply.net
- noreply@fluidreview.com
- noreply@mail.fluidreview.com

Completing Your Grant Report FAQ

7) I want to submit my grant report. How should I get started?

Grant reports can be submitted as early as September 1st each year, and word worksheets will be available on our website to draft your report. We recommend completing these documents ahead of time and then copy-and-paste the text from the worksheets into the online application form.

- [Enhancement & Restoration – Report tab](#)
Scroll down “Reporting Templates” and click link to download
- [Stewardship – Report tab](#)
Scroll down “Reporting Templates” and click link to download
- [Caribou Habitat Restoration Fund – Reporting tab](#)

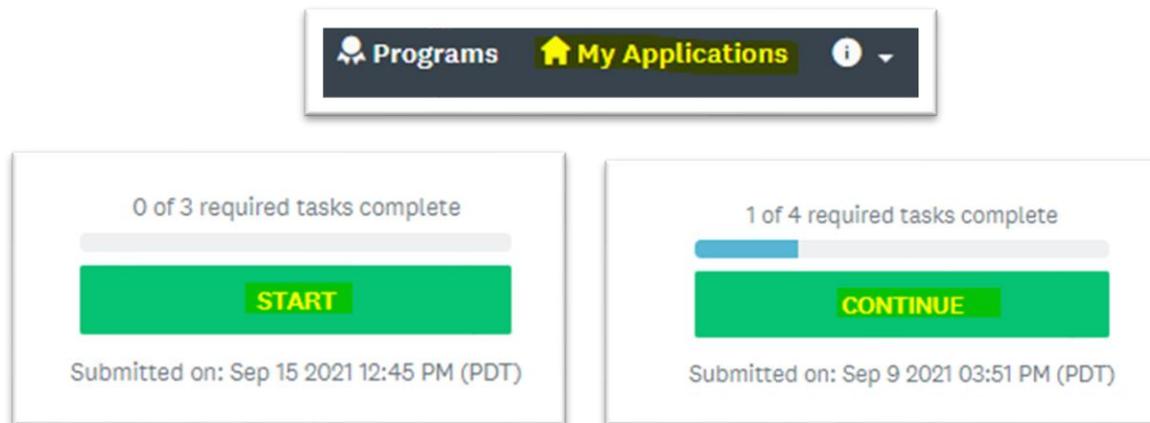


Logging into Survey Apply - Returning Users:

Navigate to the [HCTF Grants page](#) on Survey Apply, click on the program you intend to report for, and click **Login** using the email address and the password you created when you originally signed up for the Survey Apply grant management system.

Accessing the Grant Report Form

Navigate to the **My Applications** page and click the green **START** or **CONTINUE** box underneath the project title you want to open. The required tasks to complete your Grant Report will be listed here. Click on the first task to begin.

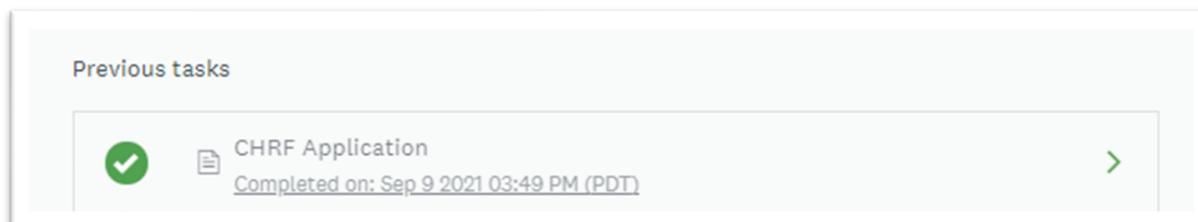


8) Are there separate forms for Annual and Multi-year Projects?

No, for E&R and Stewardship we have consolidated both forms into one.

9) How do I access my proposal form to cross-check and complete my grant report?

Once you have navigated to the project from the **My Applications** page (instructions above), scroll down to "Previous Tasks" and click on the link to your application form.



Once you click the link you will be re-directed to an online version of your application form. To download this form to your computer, click the three dots (...) on the top right corner of the document, and then click **Download**.



✓ CHRF Application
Completed Sep 9 2021 03:49 PM (PDT)

Read only

Task instructions [Hide](#)

Download

10) If I had an approved Contract extension, do I still need to submit a grant report by the deadline?

If you submitted an approved contract extension you will have another year to complete your deliverables (the report deadline will be March 31 of the following year).

11) What if I had an approved Project Change Request for a budget increase?

In your grant report, please make sure to reference this approved reallocation and your updated budget numbers.

12) What if my proposal was approved for a reduced amount?

In your grant report, please ensure you reference the correct reduced funding amount that was formally approved.

13) What if I submit my grant report past the deadline?

Submissions past the deadline may not be accepted, or eligible costs associated with the project may be denied. The Survey Apply system will remain open and able to receive reports, but you may be contacted by HCTF after submission to discuss the delay. If you believe you will be unable to meet your reporting deadline, please contact reporting@hctf.ca in advance of the deadline.

14) Why does HCTF require grant reports?

As a trust of public funds, HCTF has several requirements to ensure accountability and due diligence of trust funds. We have a responsibility to ensure that funds are invested in activities and projects that contribute to conservation of fish, wildlife, and habitat in BC.



As a public foundation, HCTF is required to prepare annual financial statements which undergo a thorough audit process. Grant reports help ensure funds were utilized in accordance with the purposes of the trust, which is a requirement for HCTF's audit.

Specifically, grant reports allow HCTF to evaluate:

- compliance with the proposal (that the funds were used for the activities and goals for which they were intended) and
- conservation outcomes (or reasonable progress towards them).

15) Who do I contact if I have trouble completing my report?

For technical system issues please contact Survey Apply directly at this link: [Apply Customer Support](#). From within the Survey Apply site you can click the "i" icon on the top right of the page and navigate to the **Help center** for useful instructions or click **Contact support** for any technical issues.



For any other concerns please contact lisa.wielinga@hctf.ca if you require additional assistance. It's best to become familiar with the new system several days before deadline day because deadline day is often very busy with questions and there could be a delay in our response time.

16) The person who submitted the application has left our organization; how do we complete the grant report?

Please contact lisa.wielinga@hctf.ca to get access to be assigned access to complete your grant report.

Note: You won't be able to change your account to another email that already has an existing account. Instead, you will need to log in to that account.

17) Can I invite one of my colleagues to work on the same grant report I am currently working on?

Yes. Within the application on the left side of the screen, click the Add Collaborators button. Upon doing so you can enter the email address of the collaborator you are adding, set the permissions of the user to "View & Edit" or "View Only" and provide an optional message to the collaborator.



Once the invite is sent the collaborator will receive it at the email provided by the applicant. Within the email, the collaborator will be able to Join the application or decline the invite. Upon clicking **Join Now** within the email the collaborator will be able to either Login or complete the registration process, depending on if they already have an account. Once they have logged in, they will be successfully added as a collaborator to the application.

Note: Collaborators are not able to submit the application – the proposal can only be formally submitted by the account that initially created the application.

Collaborators will need to verify their online account

For New Users:

Navigate to the HCTF Programs page, click on the program you intend to report for, and then Click **Apply**. You will be prompted to enter your email address and create a password. You then need to access your email to verify your new account by clicking the link in the email. A Banner will appear within your portal until you have verified your account. Click **Send Verification Link** and follow the instructions sent in the email.

▲ Your email address has not been verified!

You will not be able to submit applications or complete certain tasks until you have verified your email address

[Send verification link](#)

18) How do I navigate to other sections of the form?

The online form has different sections split into pages and it is not possible to navigate to other sections out of order. All required fields must be completed on the page before you can save and move onto the next page. To see what information is required on the application form, use the Worksheets in Word. We strongly advise applicants to complete their reports using the worksheets in word first and copy the information into the online system.

19) How do I format text in the online form?

The system does not allow formatting options like text bold, underline or italics. Formatting is not necessary and when copying from a Word file, any formatting will be removed.

20) How do I download or print a copy of my grant report once it has been submitted?

From the My Applications Page:



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

From Within the Grant Report:

If you are on the report page with the list of Tasks to complete, to download your report: Click on the More Options icon (...) in the top right corner of the report, Click **Download**

From the Preview Page:

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

21) Is there a copy forward function?

No, all the information must be entered or pasted into the online form.

22) Can I attach photos or a technical report?

Yes, you can upload additional attachments to your application including photos and a technical report. The online system gives you the opportunity to upload attachments once you have marked the report portion as complete.

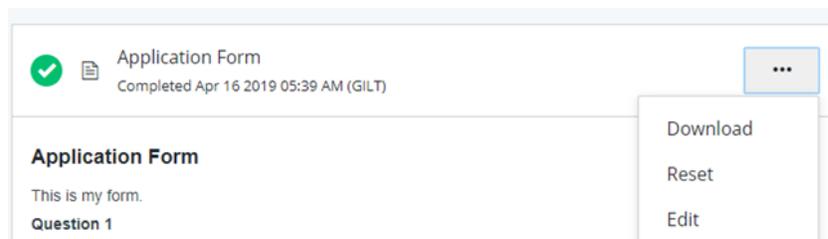
23) What is the maximum file size for attachments?

The max file size for larger attachments is approx. 15 MB. Photo and Shapefile upload tasks have more space available to upload.

24) How do I edit my responses after I have marked complete?

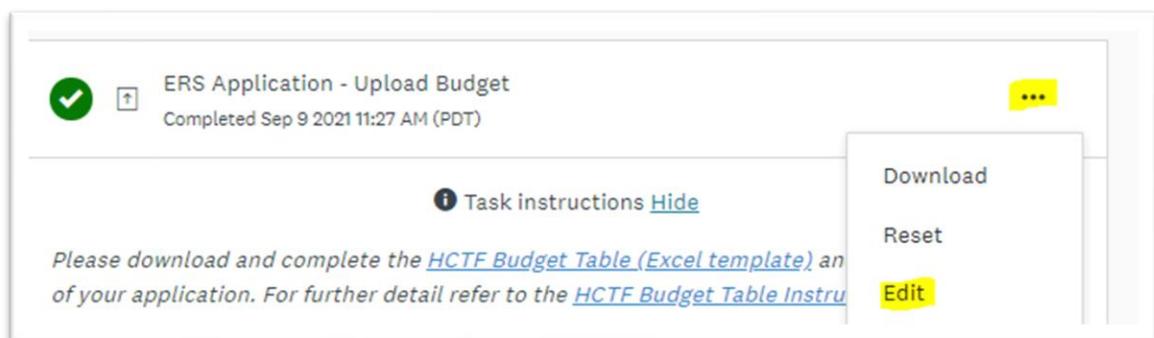
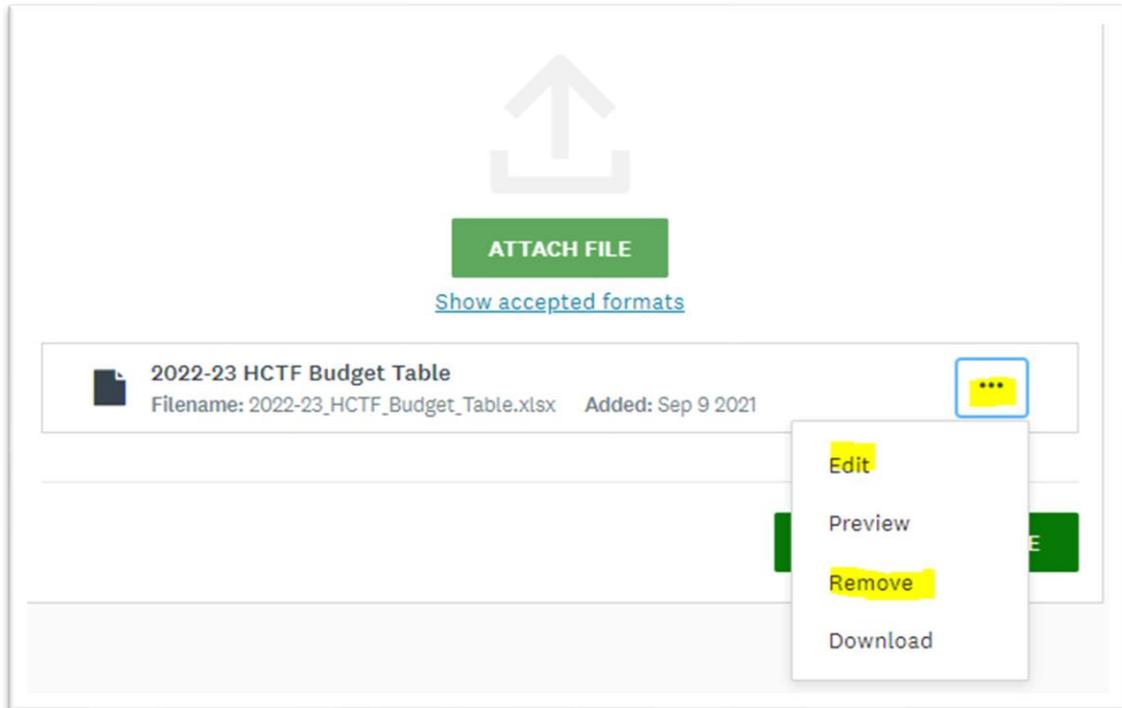
If you have previously pressed Marked as Complete on a form, but have not yet Submitted your application, you can make Edits to your task.

1. Enter into your grant report from
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 and make your changes
6. When done, navigate to the last page and press **Mark as Complete**



25) I uploaded the wrong attachment. How do I delete an attachment and re-upload?

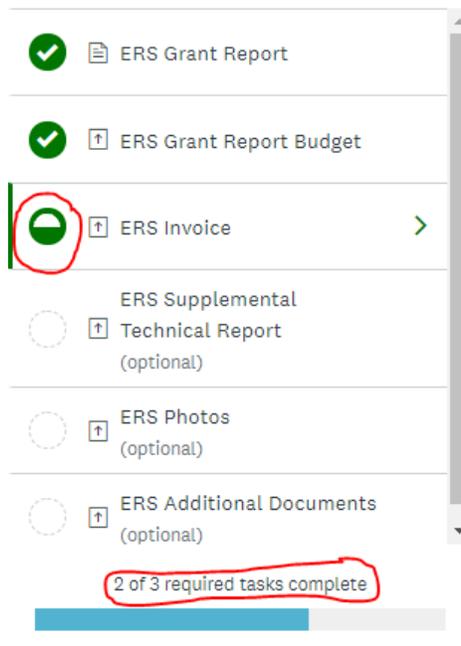
Click on the upload task you would like to edit (e.g., "Application – Upload Budget")
Hover your cursor over the task and click on the Edit icon (...) to the right of the upload task near the bottom OR select the edit icon (...) to the right of the task title near the top
Edit or **Remove** the attachment as needed



Submitting your Grant Report

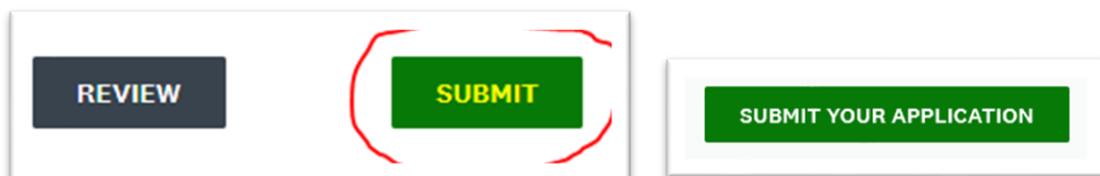
To be able to submit your grant report you will first need to complete all required tasks within your application and upload the required files. Additionally, you will need to ensure that you have verified your email.

For each task you must click **Mark As Complete**. Once complete, the green circle icon beside the task will change to a checkmark ✓. If a task is not complete there will be a half-full circle icon (see example below) which means you must first complete that task before you can submit.



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

1. Within the application to submit, select **Review & Submit**
2. **Review** application materials
3. Once you've reviewed all your completed tasks, you can click to **SUBMIT** or **Submit Your Application**



26) How do I know my grant report has been submitted?

You will receive an electronic notification email from HCTF that your application has been received. If you do not receive an email, check your Junk or Spam folder. If you still do not see it, please email HCTF.

27) Can I add more information to my grant report after the deadline?

Once your grant report has been submitted you cannot make changes to the report.

28) Can my Finance department email you the invoice separately?

No, your invoice must be submitted along with your grant report using the Survey Apply system. You can either request the invoice from your finance department and upload it yourself or add someone from your finance department as a Collaborator (see instructions above) and they can upload the invoice directly.

29) When will the grant payments be issued?

The payment will be sent once the report has been reviewed and approved by HCTF's financial and technical review teams. You should receive payment within 60 days of your submission date.

30) What should I do if I need to make changes to my grant report or invoice after submission?

If you need to make changes after formally submitting your grant report, please contact lisawielinga@hctf.ca as soon as possible.

