HABITAT CONSERVATION TRUST FOUNDATION

Survey Apply Application Guide

Grant applications are submitted online through our Survey Apply grant application system. We recommend submitting your application at least 24 hours before the deadline so that we can support you with any unexpected issues. HCTF cannot accept late applications or applications by email.

Contents (click the question)

General Information **2**

1) How to access HCTF's Survey Apply site 2
2) What to do if you forget your password 2
3) System time-out after inactive period 2
4) Which web browser to use 2
5) Receiving emails from Survey Apply 2

Pre-Application **3**

6) How to get started 3
7) Create and verify your online account 3
8) Create an online application 3

Completing the Application **4**

9) Saving the application form before completing 4
10) Naming your application. 4
11) How to add collaborators to an application 4
12) How to change the Owner of the application 4
13) How to edit the Project Name 5
14) How to navigate to other sections of the form 5
15) Formatting text in the online form 5
16) How to download or print a copy of the application 5
17) Information from previous application years 5
18) How to edit the application form after it has been marked as complete 6
19) How to change an uploaded document 6
20) How to submit the application 7
21) Confirming my application has been successfully submitted 8
22) Adding information to my application after the deadline 8
23) Who to contact if you have trouble completing the application 8

General Information

1) How to access HCTF's Survey Apply site

Click this link to apply online: Survey Apply Application System

2) What to do if you forget your password

You can reset your password by going to the HCTF Survey Apply login page, entering your email and clicking **Next**, then clicking **Forgot password**? An email will be sent to your account linked to the address 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) System time-out after inactive period

Survey Apply does not have a set time-out period and will not automatically log you out after a set time. However, technical issues (such as Wi-Fi drops or browser crashes) may cause loss of work, so we recommend saving often.

4) Which web browser to use

We recommend using Chrome for the best results.

5) Receiving emails from Survey Apply

Allow-listing emails ensures that any emails sent from Survey 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 to 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 allow-listed/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

Please note: To receive the grant notification regarding the approval of your application, the project leader's email address listed in the application form must be a verified Survey Apply email.

Pre-Application

6) How to get started

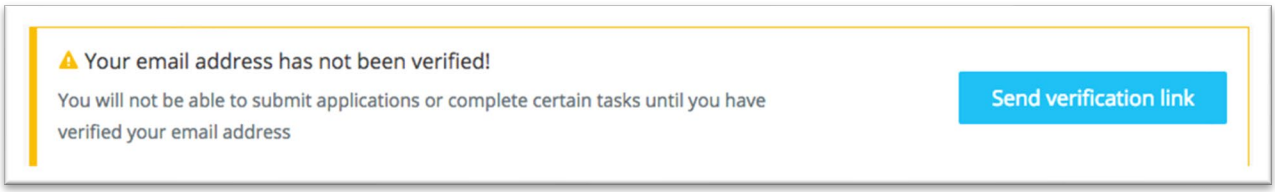
Please review the HCTF website page of the grant program you are applying for before you start your application. Additional directions and guidance on applying for a grant can be found on these pages.

Once the Survey Apply application is open, please follow the instructions to create a Survey Apply account and start your online application.

7) Create and verify your online account

For New Users:
Navigate to the HCTF Grants page on Survey Apply, click on the program you intend to apply 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.



For Returning Users:
Navigate to the HCTF Grants page on Survey Apply**,** click on the program you intend to apply 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.

Project leader: The project leader does not need to be on the online application, but they will need to have a Survey Apply account and have verified their email address to receive the grant approval notification. If the application has already been started by another team or staff member, the project leader can be added as a collaborator or register on Survey Apply for an account. If they have previously applied for an HCTF grant through Survey Apply, they do not need to register for a new account, but please ensure that they have verified their email address.
If the project leader changes after the application has been submitted, you will need to inform HCTF staff so that they can update this information accordingly. Please contact grants@hctf.ca if you have any questions.

8) Create an online application

Once you are logged into the system, navigate to the **Programs** page on the dashboard, and select the grant program you are interested in applying for by clicking **More>.**

Click the **Apply** button in the upper-right corner of the page to begin your application. You may save your work at any time and return later to complete it by logging into the system and locating the existing application under the **My Applications** tab on the dashboard.

There is no need to create a new application unless you are submitting more than one funding application.

Completing the Application

9) Saving the application form before completing

While filling out the form portion of the application, you can select the **Save & Continue Editing** button at the bottom of the page at any time before marking it as complete. This will save any information you have entered up to that point.

The screen will refresh at the top of the page, notifying you of an error with the form and indicating which required question does not have an answer. This does not affect the information saved; it is only to show you what is required before you can move to the next page.

You can then return later to complete and submit your application. The system will automatically save on a regular basis as you fill in the application form, but we strongly suggest that you save your answers at regular intervals to avoid losing any entered information if there is a loss of Wi-Fi connection or internet/power outage.

Note: If you have not completed all the required fields on a page, you will not be able to proceed. To avoid losing any work completed, please ensure you fill in all the required fields before you attempt to navigate away from that page.

10) Naming your application

When you start an application, you will be asked to provide a title. This title, also known as the Project Name, should concisely identify the project and can be a maximum of 75 characters. The title can be changed at any time before you submit your application. See 'How to edit the Project Name' for instructions on how to change the title.

11) How to add collaborators to an application

The account or person that creates the online application is the 'Owner.' Co-workers and additional proponents can be added to the application as a 'Collaborator.'

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 via the email address provided by the applicant. Within the email, the collaborator will be able to 'Join' the application. Upon clicking **Join Now** within the email, the collaborator will be able to either log in or complete the registration process, depending on whether they already have an account. Once they have logged in, they will be successfully added as a collaborator to the application. To be added as a collaborator and view the application, the collaborator must accept the invitation to join through the email sent.

Important! *Collaborators are NOT able to submit the application – it can only be submitted by the application owner. The application owner can re-assign ownership to any collaborator.*

12) How to change the Owner of the application

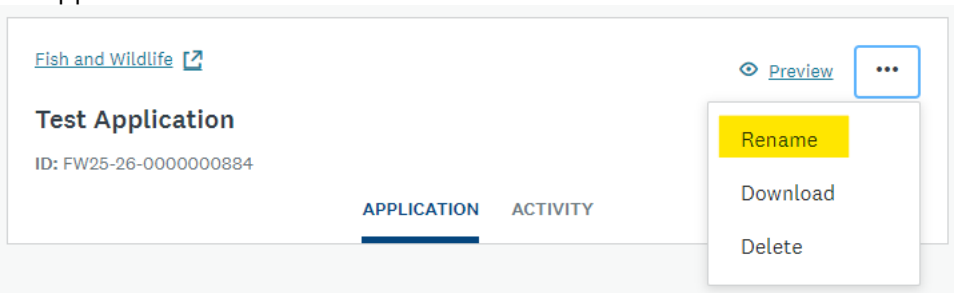
Once a collaborator has been successfully added to the application, the owner of the application can make any collaborator the new owner. Click the 3 dots (...) next to the name of the collaborator and select the 'Make owner' option. They will then become the owner, and the previous owner will become a collaborator. If the current owner is not available to log in and make this change, you will need to contact HCTF staff to complete this step.

Important! *The owner of the application does not need to be the project leader, but the project leader will need to have a Survey Apply account with a verified email address to receive the*

grant notification. ***If the project leader changes after the application has been submitted, you will need to inform HCTF staff so that they can update this information.***

13) How to edit the Project Name

To edit the Project Name, also referred to as the title, click the 3 dots in the upper panel on the right next to Preview and select **Rename**. A new empty text box will open. Write the edited name of your project in the text box and click **ok** to save your changes. Your new title will appear at the top of the application above the ID.



14) How to navigate to other sections of the form

The online form consists of multiple pages; however, 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 on to the next page. To see what information is required on the application form, use the Word worksheets provided for each program available on our website. We strongly advise applicants to complete their proposals using the Word worksheets first and copy the information into the online system.

15) Formatting 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, bullet points and some indentations will stay, but may appear differently.

16) How to download or print a copy of the application

<u>From the My Applications Page:</u>
Click on the More Options icon (...) in the top right corner of the tile of the application you wish to download, click **Download.**

<u>From Within the Application:</u>
If you are on the application page with the list of Tasks to complete, to download your application: Click on the More Options icon (...) in the top right corner of the application, click **Download.**

<u>From the Preview Page:</u>
Within the Preview, click **Download** in the top right corner.

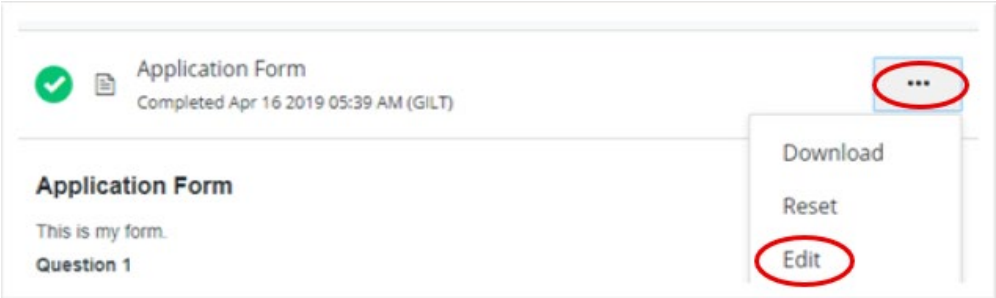
17) Information from previous application years

There is no way to automatically copy information forward from a previous application. For any New Phase or Continuing applications, all the information must be entered (typed or copied and pasted) into the current year's application online form. You can copy and paste relevant information from a previous application form manually.

18) How to edit the application form after it has been marked as complete

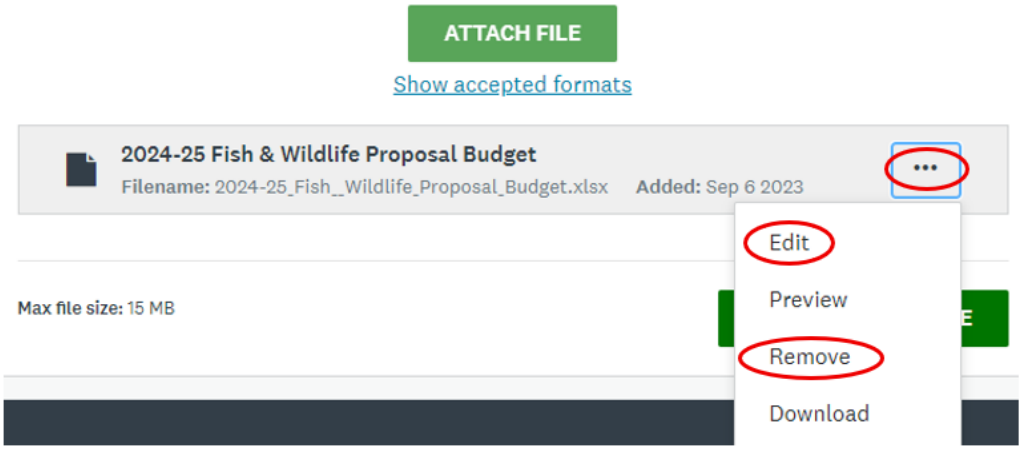
If you have previously pressed **Marked as Complete** on a form, but have not yet Submitted your application, you can make Edits to your task.

1. Enter your application and click on the task you wish to edit
2. Click on the More Options icon (...) in the top right corner of the task
3. Click **Edit**
4. Click **Previous**/ **Next** to navigate between the pages and make your changes
5. When done, navigate to the last page and press **Mark as Complete**



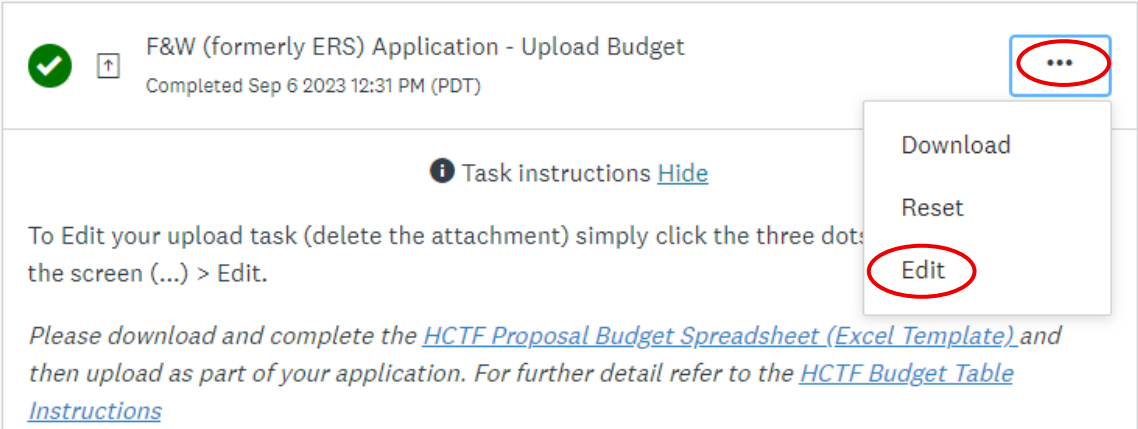
19) How to change an uploaded document

If the task is not marked as complete, click the Edit icon (...) on the uploaded file and click Edit or Remove.



If the task has already been marked as complete, you will first need to click on the Edit icon (...) next to the title of the task before you are able to see Edit or Remove in the options for the attachment.

Then you can click the Edit icon (...) on the uploaded file, and you will see Edit or Remove as options (see image above).

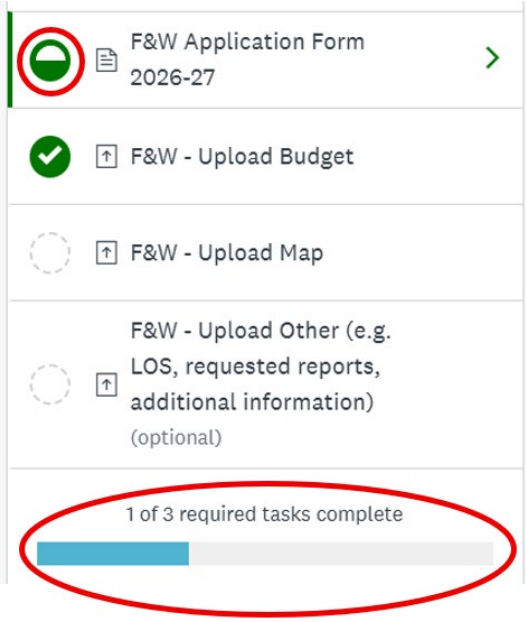


20) How to submit the application

To be able to submit your application, 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 taking the following steps:

1. Click the **Review** button
2. Review your application materials to proofread and make sure all the attachments are correct
3. Once you've reviewed all your completed tasks and are satisfied, click **Submit**

4. You will receive an auto-generated confirmation email within 1-2 minutes

Please note: Collaborators **cannot** see the Submit button. Only the owner can submit the application. Please see *'How to change the Owner of the application'* section above if the owner of the application is not available to submit.

Once your grant application has been submitted, you cannot make changes

21) Confirming my application has been successfully submitted

Once the application has been successfully submitted, the Owner will receive a notification email from HCTF that their 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.

22) Adding information to my application after the deadline

Once your grant application has been submitted, you cannot make changes to the application. The HCTF Apply System closes automatically once the deadline is passed and additional submissions are not possible. HCTF cannot accept late applications or applications by email. We may be able to add letters of support after the deadline if you have already contacted HCTF in advance to confirm this is possible.

23) Who to contact if you have trouble completing the application

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 grants@hctf.ca if you require additional assistance. It's best to become familiar with the system several days before the deadline because deadline day is often very busy with questions, and there could be a delay in our response time.