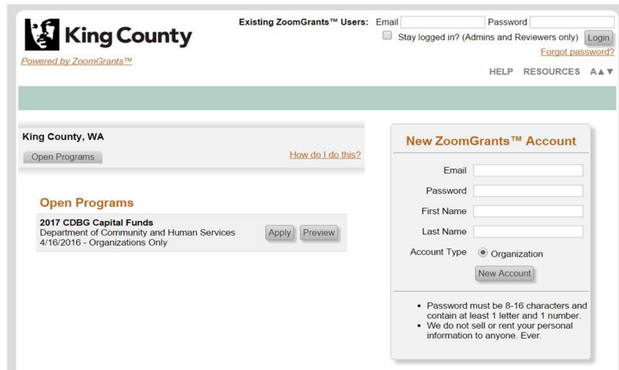
Using ZoomGrants to Submit and Manage RFP Applications

1. GO TO KING COUNTY's ZOOMGRANTS PAGE

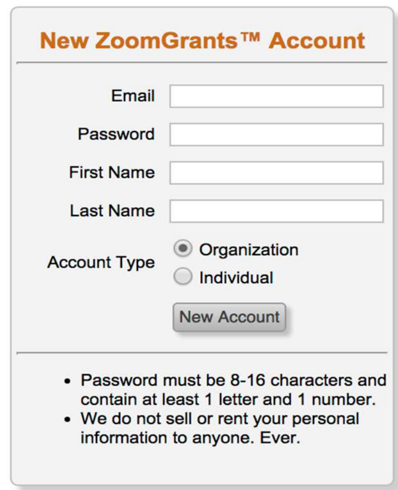


Navigate to the ZoomGrants page for King County HCD by using the link provided to you by the RFP administrator or following a link on the King County HCD website.

NOTE: For this step, ***do not go to the ZoomGrants.com homepage****.*

https://zoomgrants.com/gprop.asp?donorid=2209

2. CREATE AN ACCOUNT AND LOG IN



Create your ZoomGrants account and log in using the New ZoomGrants Account box on the right-hand side. If you already have an account, log in using the boxes in the upper right corner of the page.

IMPORTANT NOTE*: In ZoomGrants,* ***each application is officially associated with a single account and each account is 'owned' by a single user and accessed by a single email address.*** *We recommend that the person who will be the primary contact for all RFP applications creates the first account for your agency. Once that person creates their account, gets logged in, and starts the application(s), they will be able to invite other people to collaborate on all or some of the applications in their account.*

3. CREATE YOUR APPLICATION

Click the Apply button next to the appropriate open RFP to create your first application for that RFP.

The page will reload to display your newly created application. Fill in the application or project title on the summary page so that you can identify which application you are working on. If you're going to be completing your application in one sitting, click the grey Refresh Page button in the top right section of the page.

After creating your first application, you can **create additional applications** (if that RFP is allowing multiple applications to be submitted) by opening up your first, original application, then clicking the Open Programs tab in the upper left section of the page. If that RFP is allowing applicants to submit multiple applications, you will see an Apply Again button. Click it to create a new application for a different project at your agency.

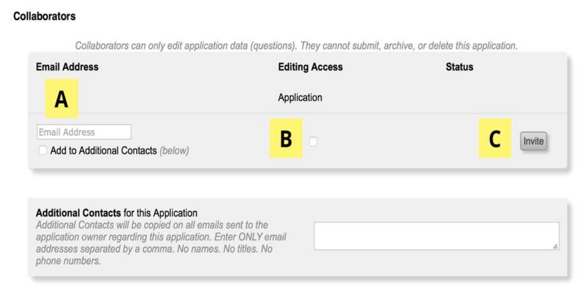
NOTE: ZoomGrants calls each RFP a "Program".

After you have created your account and your application(s), you can continue to log in via the link provided to you by King County, or **you can log in on the log in page at http://zoomgrants.com/login**

4. INVITE OTHERS TO COLLABORATE

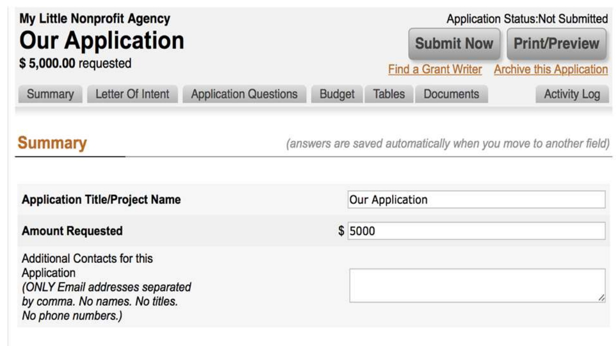
Use the Collaborators section in the first tab of the application to invite others to work on this application with you.

A. **Enter their email address.**
B. **Indicate on which sections they are allowed to collaborate**.
C. **Click the Invite button.** An invitation will be sent to their email address. They'll be able to set up an account by which they can access and edit the application.



***NOTE:** If granted access, collaborators can do everything that the application owner can do <u>except:</u> editing the Applicant and Organization information sections in the first tab of the application and submitting, archiving, or deleting the application.*

5. ANSWER THE QUESTIONS ON THE SUMMARY AND APPLICATION PAGES



The system will automatically save your answers as you move through the application and enter text then click outside of each textbox or select a multiple choice or checkbox item and click into a new field. Click on the tabs to quickly jump to another section of the application or use the 'Next' and 'Previous' buttons at the bottom of the tabs to move sequentially through the application.

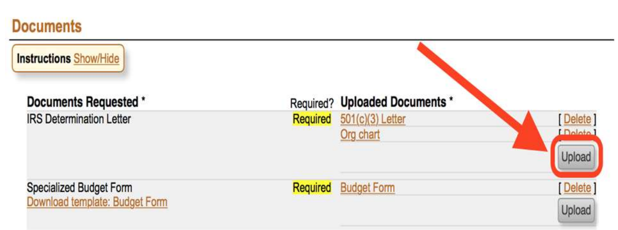
***NOTE:** Some question tabs may have a **branching question**, which will hide certain questions based on your answers to the branching question.*

6. FILL IN BUDGET AND TABLES (if applicable)

Some RFPs may use the Budget and Tables features in Zoom Grants. Not all RFPs will use these. Many RFPs ask for your budget through the upload documents page.

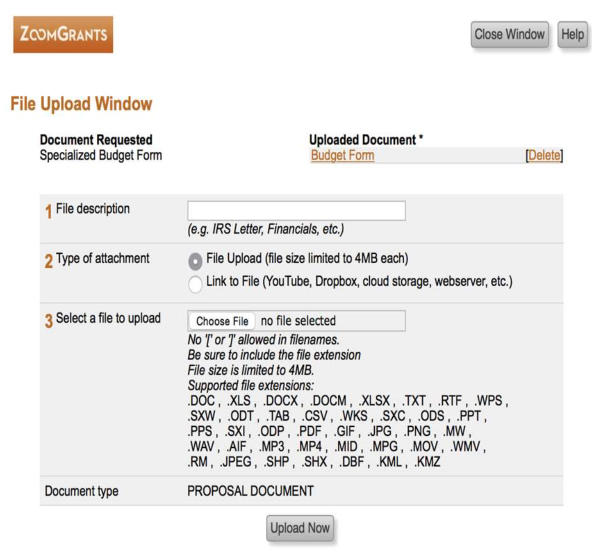
7. UPLOAD DOCUMENTS

Click the Upload button next to each applicable document request set up by the administrator to open up the File Upload Window for that request. Follow the instructions in the window to upload or link a file (or multiple) in that slot.



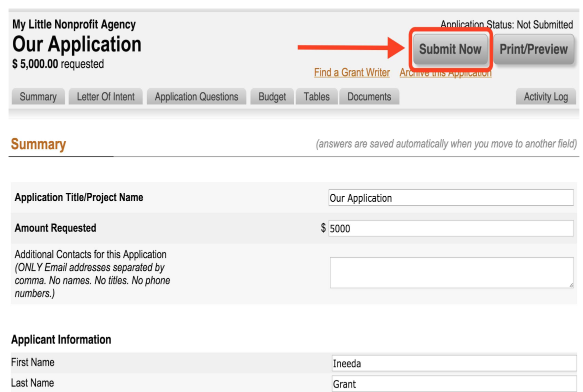
NOTES:

1) *Any document request marked with a yellow **'Required'** note MUST have something uploaded or linked in that slot in order for your application to be submitted. If you feel a required request is not applicable to you, create a document in which you note the inapplicability and upload that into the slot.*
2) *Documents that are not indicated as 'Required' may be required for some applicants and not others. Be sure to carefully review the application instructions regarding those documents.*
3) *If the administrator has provided a template, click the orange 'Template' link to download that template. Fill it out, then upload it into that slot.*
4) *Click the Help button in the File Upload Window to access a quick tutorial video (also available here: http://youtu.be/b0Ixkjss_Ow).*
5) *If you finish your application by uploading documents, use the grey Refresh Page button to reload the page before clicking the Submit Now button to submit your application.*



8. SUBMIT THE APPLICATION

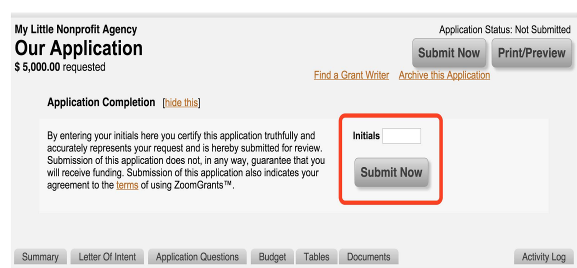
Click the grey Submit Now button at the top of the application when you've completed the applicable content in every tab. **The system will check to ensure you have answered every question and uploaded all documents that are indicated as "Required".** Any skipped questions or missing documents will be listed in red. When you're done with your edits, use the grey Refresh Page button in the application to reload the page, then click the Submit Now button to re-run the check. If your application is complete, you'll be able to enter your initials and officially submit the application.



NOTES:

*1) The **completion check** verifies that you have answered the applicable questions and uploaded documents marked as "required', but <u>you</u> are responsible for ensuring you have completed the content requested in the budgets and tables (as applicable) and uploaded the documents that are requested for certain applications but not indicated as 'Required' for all applications.*

2) If the administrator has chosen to let you make changes to your application even after it has been submitted, you can edit your submitted application up until the deadline passes. If you <u>do</u> make any changes, you do NOT need to 're-submit' it. The changes are automatically reflected in the submitted application.



ZOOMGRANTS TIPS:

- Be sure to check out the "Help" also known as "Zoom Grants University". If you are logged into your account, you can click on "Help" on the top right of the ZoomGrants screen. You don't have to be logged in to get there by this link: https://zoomgrants.zendesk.com/hc/en-us

- Here are a few things to keep in mind as you consider who should be the account owner for your agency:
  - **Each organization account is *owned, accessed,* and *managed* by a single set of login credentials (email address and password).** If you will have multiple people who need full access to the applications in your account, we recommend setting the email address associated with the account to either be the person who will be *primarily responsible* for managing your organization's applications or a *general email address*, perhaps even an alias that sends emails to multiple people who will be managing your applications.
  - **Additional users can be added to individual applications within the account.** If you have a colleague who just needs access to one application and someone else who is in charge of submitting the invoices for all of your approved applications, the account owner can give that access to those individuals by adding them as *Collaborators* on the appropriate applications. If you have certain people who should receive email notifications pertaining to a specific application, you can add them as *Additional Contacts* on that application.
  - **If the account owner leaves your organization, make sure they have shared their latest account credentials before they leave so that you can continue to access the account.** If they have already left and you don't have the account credentials, submit a support request to ZoomGrants so that they can help you transfer the account to someone else and set up a new password.

- The Website address must have a response- if the agency does not have a website you should put NA in the space provided

- SAVING- is blinking…. There is a glitch and you need to double click on the page – this will usually stop the blinking. Often the information you just added is not there –often is an internet issue – not the system. To verify all is still working, make a small edit on the answer and see if it is saved when you go out and come back in to the application. Contact ZoomGrants for technical assistance if there appears to be a problem.

- You can start uploading any/all documents into the ZoomGrant system at any point. You do not have to wait until you have successfully been approved to be in the Application phase to be uploading required documents for your application.

- Changes after SUBMITTAL – once you have submitted your application you do not have to submit it again if you needed to revise a response. Your edits will update information previously input into the system. You will only be allowed to make changes to your Application until the published deadline for submitting the application.

- "White list" your e-mail from ZoomGrants. Often agency's IT folks will direct unfamiliar e-mails to an individual's 'Junk e-Mail' folder. Make sure to 'white list' ZoomGrants with your IT folks so that you are able to see any communication that comes through to you from ZoomGrants. This is Highly Recommended. If you are unable to do this method then we suggest you perform a daily quarantine report to see if you have received messages from ZoomGrants concerning your application.

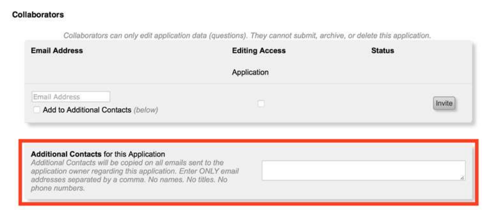
Frequently-Asked Questions

How do I create an additional application for an open RFP?

If you need to create additional applications for a different RFP (referred to as a "program" in ZoomGrants), open up the application that you have already started, then click the Open Programs tab. From there, you can see all of the RFPs for which King County HCD is currently accepting applications. Click the Apply Again button to create an additional application.

How can I add other email addresses to receive email notifications?

If you need to add other email addresses to receive email notifications regarding an application, type each email address into the Additional Contacts field near the bottom of the first tab of the applicable application.



How do I access an application that I have already started or submitted?

Once you've started an application, you can log in at https://ZoomGrants.com/login. Once you get logged in, you'll land in the Incomplete tab of your Account Home page. Click an orange application title to open one of your incomplete applications. Click on the other tabs - Submitted, Approved, etc. - to access other applications.

I am a contract grant writer who will be writing the bid proposal for a non profit agency. How can I use ZoomGrants?

Any organization that is using you as a grant writer must have their own account. They will need to add you as a collaborator on the applicable applications within their account.

I can only see a line at a time when I type my response to the question. Is there another way to view while inputting my response?

It is recommended that you type your answer in a Word document and then copy it into the response segment in ZoomGrants. This provides you the ability to review and edit at your leisure and to note the 'word count' in case you want to abbreviate your response.

What browser should I use?

We recommend using Chrome, but you can use any browser on any internet-enabled device.

Who should I contact if I have questions?

- If you have **CONTENT-related questions**, contact the King County RFP administrator through your ZoomGrants application.
- If you have trouble connecting to ZoomGrants or have **TECHNICAL questions about ZoomGrants**, contact the Tech Support Desk by emailing Questions@ZoomGrants.com or calling (866) 323-5404 x2. The Support Desk is available Monday through Friday between the hours of 7 AM to 4 PM Pacific Standard Time. They are closed on recognized holidays.
- You can also click "HELP" at the top right corner of the ZoomGrants screen or access Help via https://zoomgrants.zendesk.com/hc/en-us