



Jefferson Regional Foundation

GOapply User Instructions

Updated September 2024

JRF Webpage: [Jefferson Regional Foundation | Pittsburgh, PA \(jeffersonrf.org\)](http://jeffersonrf.org)

GOapply Link: <https://goapply2.akoyago.com/jefferson>

**Have Questions? Contact Steve Ankney, JRF's Grants,
Evaluation, & Data Manager**

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Introduction to GOapply at Jefferson Regional Foundation

The Jefferson Regional Foundation adopted GOapply as the new grant application and reporting platform for nonprofit organization partners in summer 2024. Similar to the Foundation's previous system, eGrant, users can create accounts to submit and view previously submitted letters of intent (LOIs), proposals, and grant reports.

The individual account you create will be linked to your organization. Other colleagues from your organization can also create individual accounts linked to your organization. This allows multiple people from your organization to collaborate on grant materials.

Creating an Account

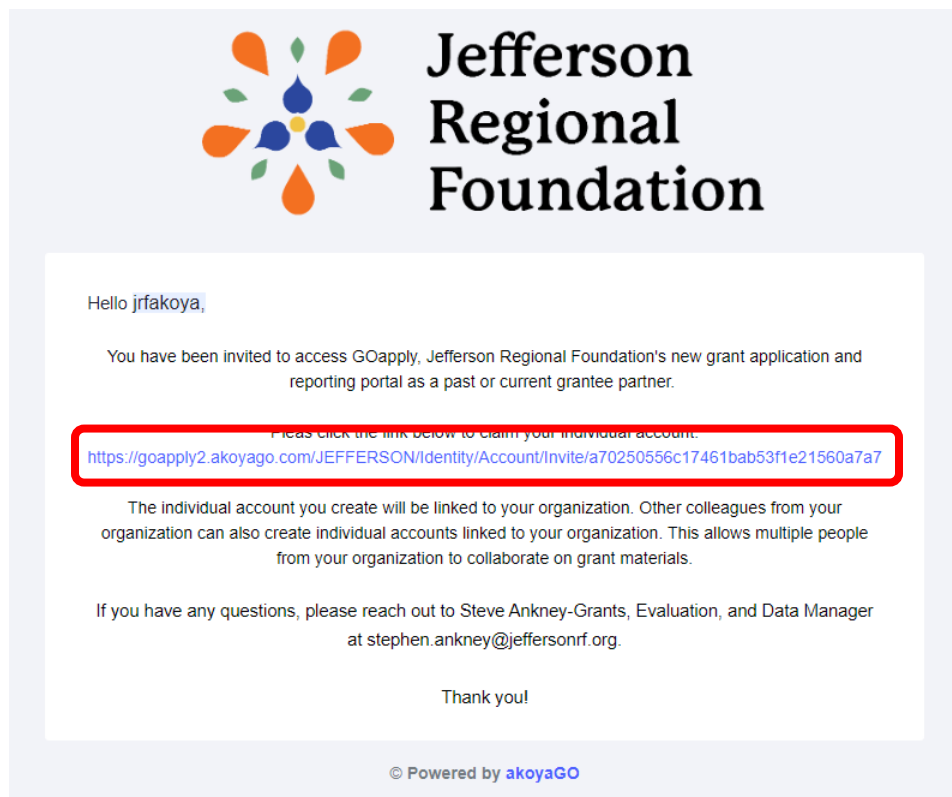
Users using JRF's GOapply system *for the first time* will need to create an account.

There are two ways to create a GOapply account:

- 1) You can be invited to create an account by the Foundation.
- 2) You can create an account on your own.

Creating an Account Through a Foundation Invitation

Foundation staff may directly invite you to create an account in GOapply. If this is the case, you will receive an email similar to the one pictured below.



Click the invitation link to be taken to the GOapply new user screen where you will be prompted to create your password. Be sure to use a strong password that is unique to this account. **Note: passwords must be at least 10 characters long.** For tips on creating a strong password, review this article from the US Cybersecurity & Infrastructure Security Agency: [Use Strong Passwords | CISA](#).



OnboardNewUser

YourEmail
✉ jrfakoyatest@yahoo.com
OnboardNewUserEmailHelpBlock

* Password
🔑 Password

* ConfirmPassword
🔑 Password


Submit

Once you've created your strong password, click submit. Congratulations, you've created your GOapply account! You will be redirected to the GOapply "Opportunities" page, where you can begin a letter of intent (LOI) by clicking "View" to the left.

After you've created your account through an invitation from the Foundation, you can skip ahead in this manual to the "[Maintaining Your Account](#)" or "[Navigating GOapply](#)" sections.

Creating a GOapply Account on Your Own

- Click the [GOapply link](#) on the [Foundation's website](#) or in these instructions.
- When taken to the GOapply sign in page, click "create a new account".



Jefferson Regional Foundation

Sign in to your account

Or [create a new account](#)


Your Email

Your Password

Remember me [Forgot password?](#)

You will be taken to a page to search for your organization. Enter your organization's EIN, or Tax ID in the search bar and click "Search". If you are unsure of this information or prefer to enter your organization's information manually click "Skip, manually enter".

Note: If your organization's name does not appear, or the organization is new to the Foundation, you will have to enter your organization's information manually the first time you register a new account.



Jefferson Regional Foundation

Search for your Organization

Choose your region:

Search by Organization Employer Identification Number (EIN)

Every organization has its own unique federal employer identification number (EIN), which it obtains by applying to the IRS. An EIN is typically a nine-digit number, shown like 12-3456789. A few charities have EINs with eight or fewer digits (normally shown with a leading zero like 01-2345678).

[US IRS Tax Exempt Organization Search Tool](#)

[Skip, manually enter](#)

[Return to login](#)

After entering your organization's information and clicking "Search" select the correct organization on the next page.



Jefferson Regional Foundation

Organizations matching: Jefferson Regional Foundation [Search again](#) [Skip manually enter](#)

Jefferson Regional Foundation
The Jefferson Regional Foundation, located south of Pittsburgh, PA, is dedicated to investing in the health and vitality of Jefferson Hospital communities. The Foundation is a support organization for Jefferson Hospital (not a private foundation). Our activities must broadly support the mission of the Hospital as it fulfills its vision to improve the health and well-being of the residents in its service area.

470 Streets Run Road
Suite 301
Pittsburgh, Pennsylvania 15236
AKA: JRF

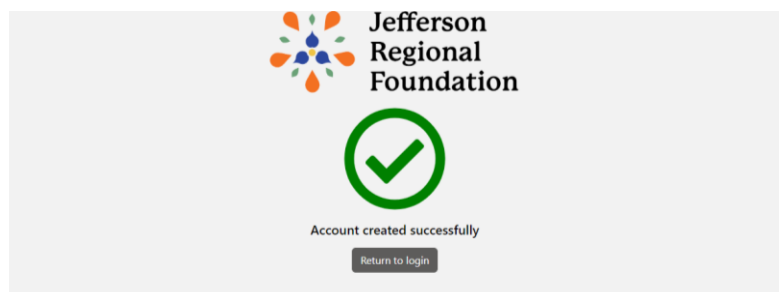
03 : 501(c)(3)

Select

[Return to login](#)

Next, fill out your required information including a password and click "Register". Be sure to use a strong password that is unique to this account. **Note: passwords must be at least 10 characters long.** For tips on creating a strong password, review this article from the US Cybersecurity & Infrastructure Security Agency: [Use Strong Passwords | CISA](#).

You should be taken to a screen that indicates your account was created successfully.



Jefferson Regional Foundation

Account created successfully

Return to login

After creating your account, click the "Return to login" button and enter your new account credentials. You will be redirected to the GOapply "Opportunities" page, where you can begin a letter of intent (LOI) by clicking "View" to the left.

Maintaining Your Account

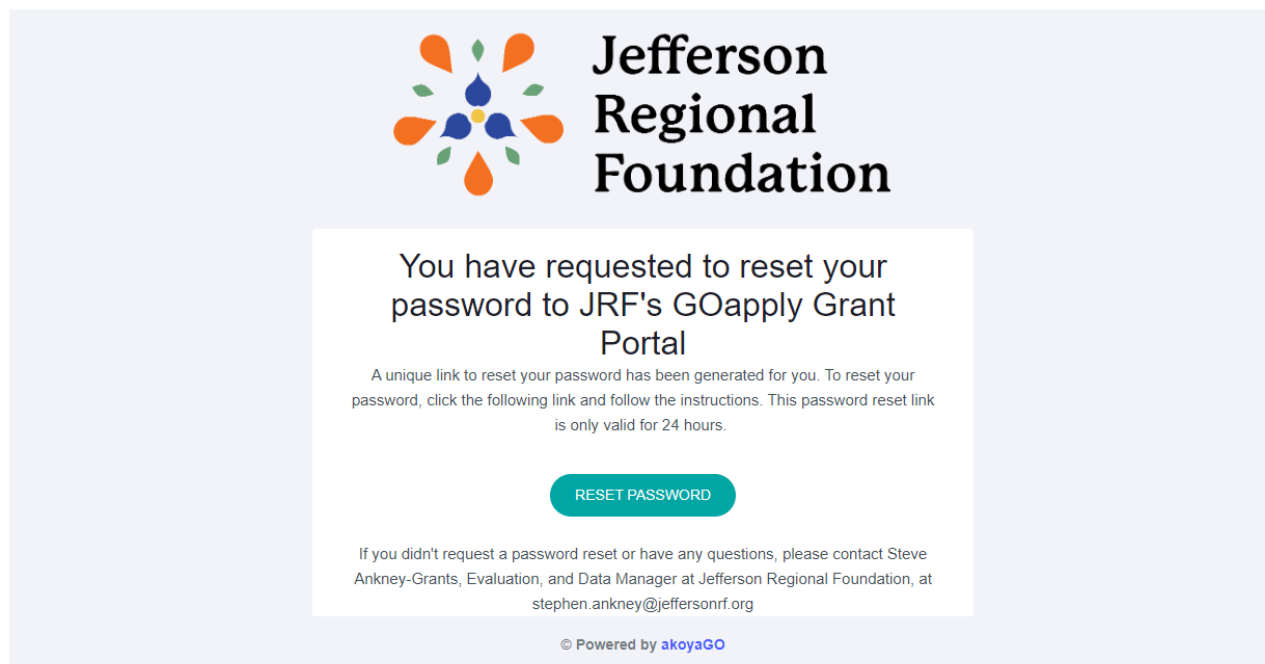
As you use the GOapply system it may be necessary to reset your password and update your organization's information in the case of an office move, leadership change, etc.

The sections below detail these processes. The sections below are not required for account creation but serve as a reference should the need arise.

Resetting Your Password

If you forget your password, return to the [GOapply login page](#) and click “Forgot password?”.

Enter the email address associated with your user account, and you will receive an email with a link to reset your password. Click the “Reset Password” button and follow the instructions to create a new password.

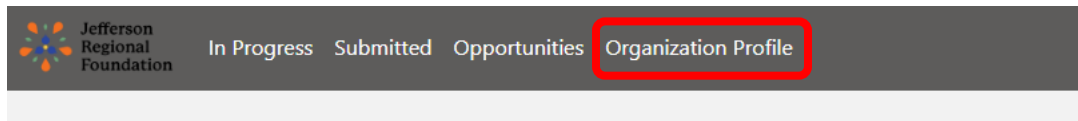


Editing Your Organization Profile

After creating your account, it may be necessary to update basic information about your organization as it grows and changes. If, for example, your organization’s mailing address changes, you can update that in the “Organization Profile” section of GOapply.

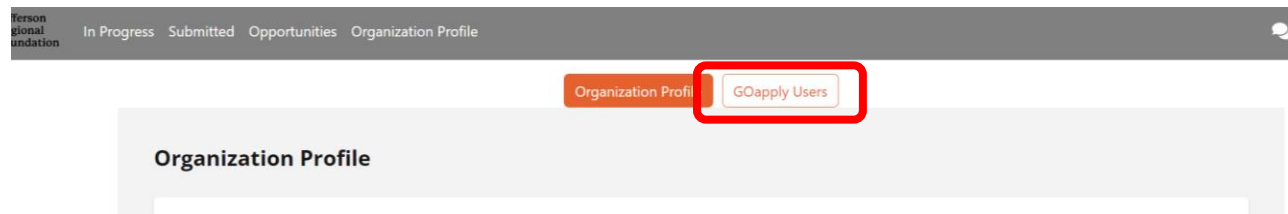
The Organization Profile contains basic information about your organization that is editable including organization name, address, tax ID, mission, etc. as well as who is designated the primary contact for the organization. This information will auto-populate in any LOIs, proposals, and reports that you begin in GOapply.

To edit information in your organization profile, log into GOapply and click on the “Organization Profile” tab at the top of the page.



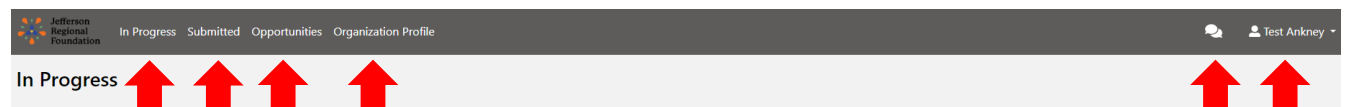
Update any of the fields that you need to and click “Submit” to save your Organization Profile.

Users can also view the list of GOapply users linked to their organization in the Organization Profile. After navigating to the Organization Profile, click on “GOapply Users” at the top of the page.



Navigating GOapply

GOapply has multiple tabs indicated with red arrows in the picture below:



In Progress: Shows any LOIs, proposals, or reports that your organization is currently working on that have not been submitted.

Submitted: Shows previously submitted LOIs, proposals, and reports. You can view or download submissions to review as well as check the status of your submissions.

Opportunities: Shows grant opportunities that the user’s organization is eligible to submit. **Note:** Currently only LOIs are visible through the opportunities section. If a user’s organization is invited to submit a full proposal, it will show in the “In Progress” tab.

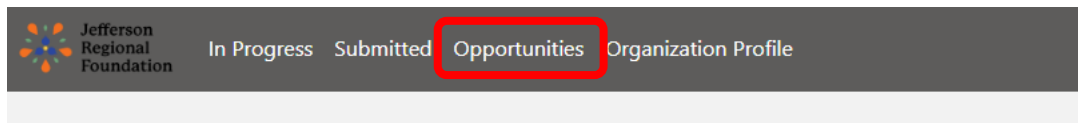
Organization Profile: Shows basic information about the organization that is editable including organization name, address, tax ID, mission, etc. as well as who is designated the primary contact for the organization. There is also an option at the top of the screen to view other GOapply users from the organization. **Note:** Information in the Organization Profile section will feed to any LOIs, proposals, and reports that your organization begins.

Messages: Shows any messages sent through the GOapply system. Direct communication regarding grants and reports will generally come in the form of direct emails or phone calls from JRF staff to nonprofit organization staff.

User Settings (Shown as your name): Here you can change your password and log out of the GOapply system.

Submitting an LOI

To begin a submission, navigate to the “Opportunities” tab.



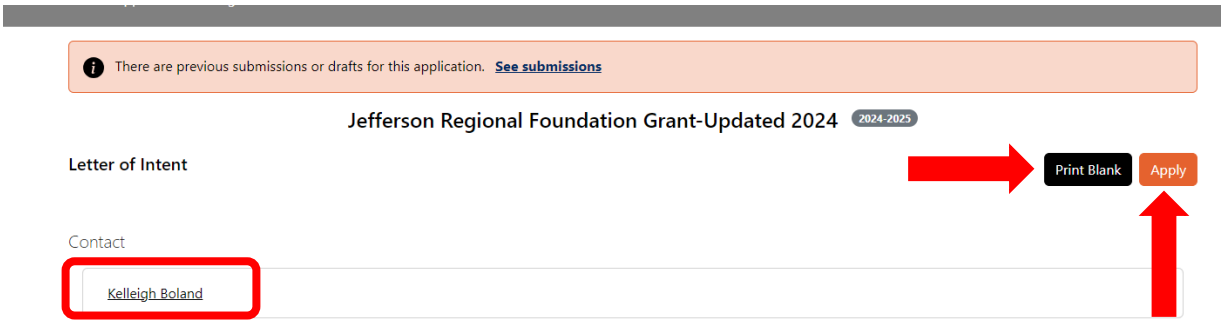
Click “View” on the opportunity that the organization would like to complete a submission for.



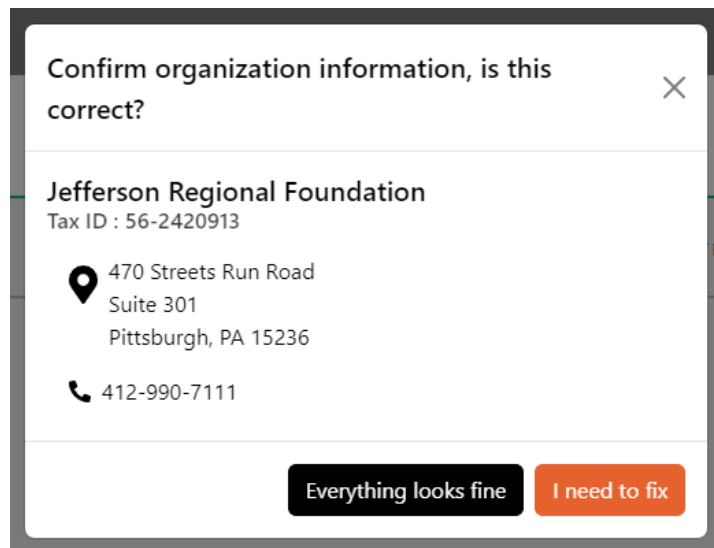
This will take you to the application home page where you can view the application phases that your organization is eligible to apply for.

There are a few options that you can select on this page:

- Click on “Print Blank” to print a blank PDF copy of the application for reference.
Note: This option will print every question on the opportunity including those that may be initially hidden based on branching logic. If, when completing an opportunity, you do not see a question that appeared on a blank PDF copy that you printed, do not be alarmed.
- Click “Apply” to begin submitting an LOI (which will then appear in the “In Progress” tab after you start and save it).
- Click on Kelleigh Boland’s name to email her to ask questions.



When your organization is ready to start an application, click the “Apply” button. A message will pop up with information from the “Organization Profile” tab, which gives you an opportunity to edit any details before starting a submission. If you would like to edit any of the details shown, click “I need to fix”. When you are ready to start your submission, click “Everything looks fine”.



Next, fill in information in the fields of the LOI while using the “Next” button to advance to subsequent pages. Fields marked with a red asterisk (*) are required.

Pro Tip: GOapply will routinely automatically save your progress, but you should hit the “Save Draft” button at the bottom of the screen frequently to ensure that your data is being saved.

Email Address *

Title *

Contact Office Phone *

Ext. *

Contact Mobile Phone *

Save Draft

Next >

After completing all the questions, click the “Submit” button to submit your LOI, proposal, or report. Your organization will receive an email indicating that your submission was accepted.

Save Draft

< Previous

Submit

Note: After clicking “Submit”, remain on the screen until you see the confirmation screen below.



Letter of Intent

Thank you for submitting your Letter of Intent to the Foundation. Foundation staff will review your Letter of Intent and be in touch within three weeks.

If you have additional information that you would like to share in the meantime, please email Kelleigh Boland-Director of Grantmaking & Strategy, at kelleigh.boland@jeffersonrf.org.

Once your LOI is submitted, you will receive an email confirming that your submission was accepted for review. A PDF copy of your LOI will be attached. **Note:** This does not mean that your organization will be invited to complete full proposal and/or receive funding, only that your letter of intent was accepted for review by the Foundation.

Accessing Draft LOIs

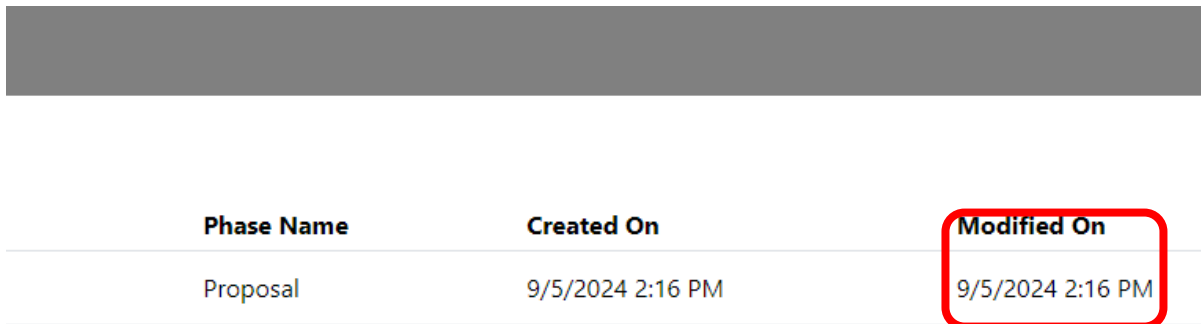
When completing an LOI in GOapply, it may be necessary to leave the system and return at a later time to complete your submission. Before exiting GOapply, **click the “Save Draft” button at the bottom of the screen to save your draft. Note: The GOapply system automatically saves data routinely, but it is best practice to save your drafts often.**

To access the draft that you want to work on, navigate to the “In Progress” tab, identify the submission that you want to resume, and click “View”.



Jefferson Regional Foundation				
In Progress Submitted Opportunities Organization Profile				
In Progress				
	Opportunity Name	Phase Name	Created On	Modified On
View	Jefferson Regional Foundation Grant Application Process	Proposal	9/5/2024 2:16 PM	9/5/2024 2:16 PM

You will be able to see the last time that your submission was modified in the “Modified On” column. This can help you keep track of when colleagues at your organization are working on materials.



Phase Name	Created On	Modified On
Proposal	9/5/2024 2:16 PM	9/5/2024 2:16 PM

Opportunities for Feedback

The Jefferson Regional Foundation is interested in better understanding the time required to complete our grant application. There are opportunities for feedback at the end of the LOI and Proposal phases, and we encourage honest reflection and sharing. The Foundation will review responses to these questions and consider improvements to GOapply for ease of use. Responses to these questions will be used to inform the Foundation's grantmaking processes and will not impact the consideration of applications for funding.