APPLYING FOR CANADIAN RED CROSS PROGRAMS USING SURVEYMONKEY APPLY

A Guide for Applicants

https://redcross.smapply.ca

Contents

About this guide

This guide provides a basic overview of how to complete, edit and submit an application to a Canadian Red Cross program using SurveyMonkey Apply.

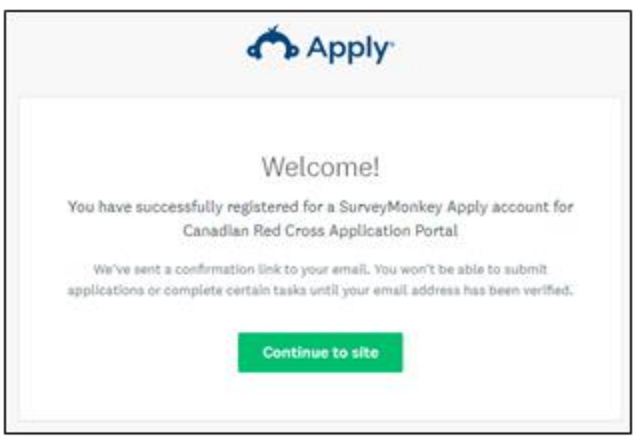
In addition to this guide, you can get support with using SurveyMonkey Apply as follows:

- For questions about SurveyMonkey Apply, see the SurveyMonkey Apply FAQ.
- If you need support for a technical issue with SurveyMonkey Apply, access their customer support.
- If you need support with the application process, go to the Canadian Red Cross website and use the **How we help** menu to navigate to the program you are applying to. The program page will have contact information, including a phone number and email, where you can reach out to a Canadian Red Cross representative for help.

Creating a SurveyMonkey Apply account

Before starting your application, you must create a SurveyMonkey Apply account:

1. On any web-enabled computer or mobile device, go to https://redcross.smapply.ca.
   Note: SurveyMonkey Apply works best on Firefox, Google Chrome or Microsoft Edge.
2. At the top of the page, click **Register**. The **Registration** page appears.
3. Create your account:
   a. In the appropriate text boxes, enter your name and email.
   b. Choose and enter a secure password.
   c. Click **CREATE ACCOUNT**.
4. The system will send a prompt to verify your email.
5. If you do not verify your email address, an error message appears. You will be unable to continue with your application. To resend the verification link, click **Send verification link**.
6. Upon successful verification, the **Welcome** page appears. To continue with your application, click **Continue to site**.



	See SurveyMonkey Apply—General Account FAQ—How do I register as an applicant https://help.surveymonkey.com/en/apply/faqs/account-faq/

Using the application form

This section provides an overview of how to use the application form, including the **Task List**, saving your work and editing sections.

Opening your application form

You can open an application from the **Canadian Red Cross SurveyMonkey Apply** page:

1. Go to https://redcross.smapply.ca and select the program you are applying for.
2. To access specific information about the program, under the program title, click **MORE**. The **Program Information** page appears.
3. To begin your application, click **APPLY**. The **Application Form** opens.

Understanding the Task List

The **Application Form** consists of several tasks. Some of the tasks are mandatory.

Once you begin the application, the **Task List** appears on the left-hand side of your page. The **Task List** provides a road map of all the tasks that must be completed. The **Task List** icons provide the following information:

	Task not yet started
	Task in progress
	Task completed

Use the **Task List** to navigate through the application steps. The progress bar below the **Task List** provides a summary of your progress (e.g., 2 of 4 tasks complete). At any point, you can save your progress and return to complete the application at another time.

Before you can submit your application, **all mandatory tasks must have a red check mark**.

Saving your work

As you complete the form, you can save your work periodically:

1. At the bottom of the form, click **SAVE & CONTINUE EDITING**.

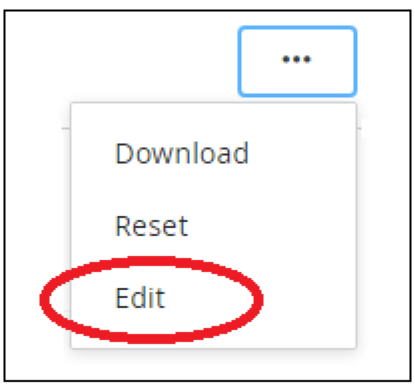
2. The system alerts you if the form contains errors, including whether there are blank fields that have not yet been filled out. **The form will still save with the errors.**

3. Once you save the partially completed form, the status of your form in the **Task List** will turn half red to indicate it is in progress.

Completing and editing sections

Once you have finished a section, you can mark it as complete:

1. At the bottom of the form, click **MARK AS COMPLETE**. The task will get a red check mark on the **Task List.**
2. If you have completed the section and would like to return to make a change, you can reopen it:
   a. At the top of the page, click the **three dots**. A drop-down menu appears.

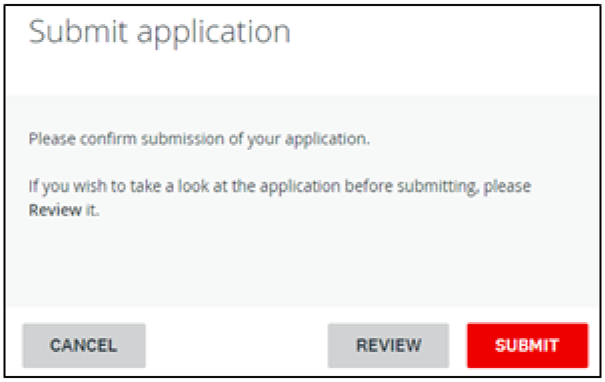


   b. Select **EDIT**.
   c. Once you have completed your edits, click **MARK AS COMPLETE** again.

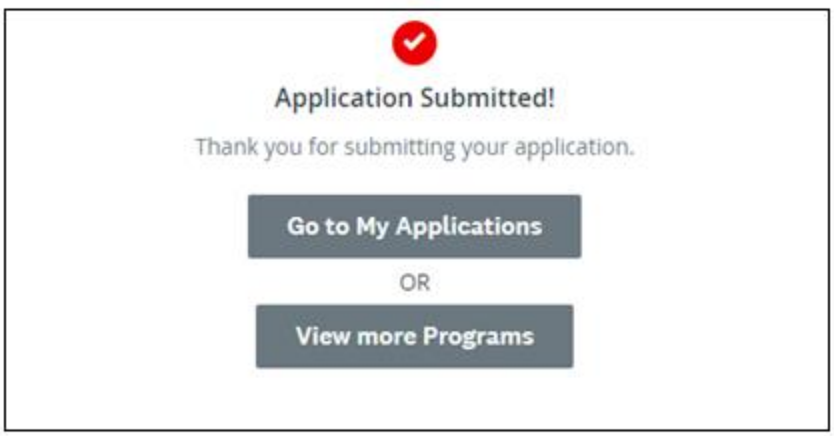
Submitting your application

Once there is a check mark next to all sections in the **Task List**, you are ready to submit your application:

1. Under the **Task List**, click **SUBMIT**. The **Submit application** pop-up window appears.



2. To review your application and documentation before your final submission, click **REVIEW**.
3. If everything is correct, click **SUBMIT**. You will receive a confirmation message, and your application will be forwarded to the Canadian Red Cross for review. If additional information is required, a representative from the Canadian Red Cross will contact you.



4. To view this and other completed applications, click **View More Programs**. The **View more programs** page appears.

Understanding the application statuses

Once you complete your application, you can view its status as it moves through the review process. The following table provides more information on what each status indicates.

In Progress	The application is being completed and has not yet been submitted.
Submitted	The application is complete and has been submitted to the Canadian Red Cross for review.
Under Review	The application is being reviewed by the Canadian Red Cross.
Project Active	The application has been selected and is active.
Withdrawn	The applicant has withdrawn their application from consideration.
Duplicate Application	Multiple applications from the same applicant/organization have been submitted. The Canadian Red Cross will contact the applicant to confirm and merge the applications.
File Closed	The application has been closed and will no longer be processed.

Managing your SurveyMonkey Apply account

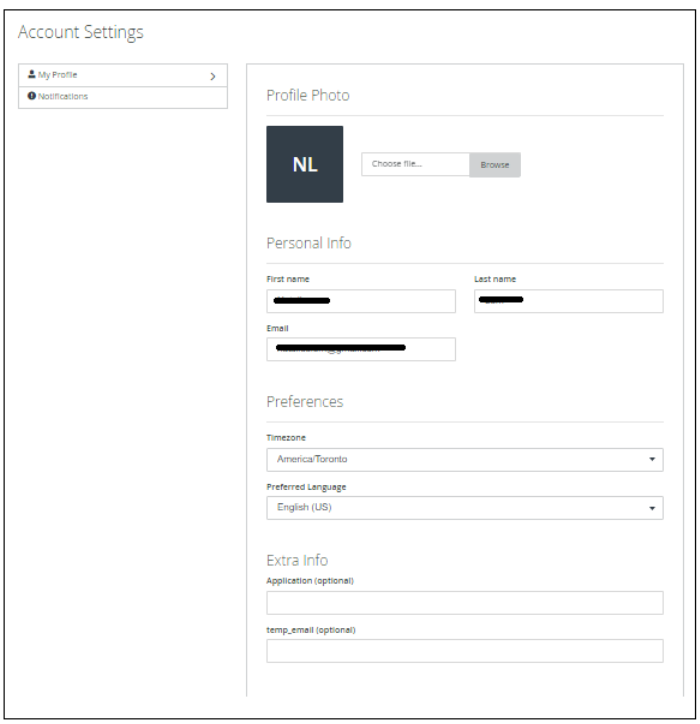
You can update the name or email associated with your account, change your password, add and remove collaborators, change the application owner, view in-progress and submitted applications, and resolve issues with your account.

Changing the name or email associated with your account

Once you have created an account in SurveyMonkey Apply, you can change the name and/or email address associated with the account:

1. Log in to your SurveyMonkey Apply Account.
2. At the top right-hand side of the page, click your name. A drop-down menu appears.

3. Select **My Account**. The **Account Settings** page opens.

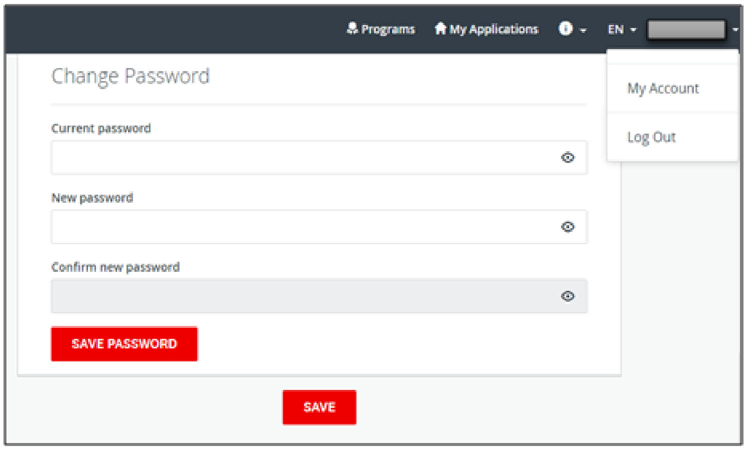


4. In the appropriate fields, enter your updated information (name, email and/or time zone preference).
5. At the bottom of the page, click **Save**.

Changing your password

To change your password, do the following:

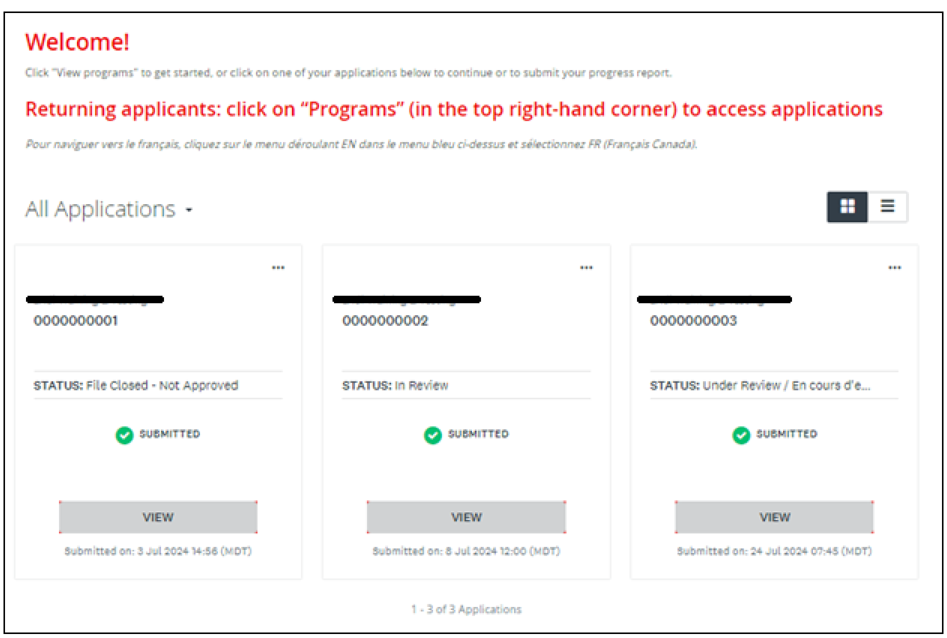
1. On the top right-hand side of the page, click your name. A drop-down menu appears.
2. Select **My Account**.
3. Scroll down and click **Change Password**. The **Change Password** page appears.
4. In the appropriate fields, enter the updated information and click **SAVE**.



Viewing in-progress and submitted applications

To display the applications that you have in progress or have submitted, do the following:

1. From the top menu, click **My Applications**. The **Applications** page appears with all of your in-progress or submitted applications. The application status will show as **Application in Progress** until you submit the application. For a list of application statuses, see **Understanding the Application statuses** on page 5.
2. To view your application, click **VIEW**. The application opens.



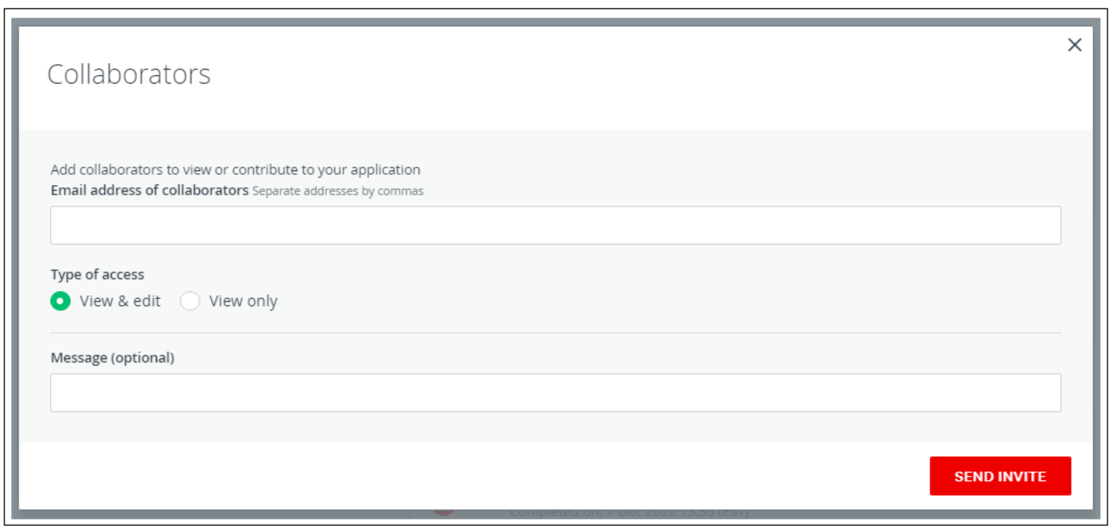
3. To preview the full application, at the top right, click **PREVIEW**. A preview of the application appears.
4. To download a copy of the application, at the top right, click the **three dots**. A drop-down menu appears.
5. Select **Download**. A PDF of your application opens.

Adding a collaborator to your application

We understand that you may need to add multiple users to the application process to complete the application form. When this is needed, you can add a collaborator to your application form. Adding a collaborator allows multiple users to view and edit an application without having to share the same log-in information.

To add a collaborator, do the following:

1. Ensure the user you are adding as a collaborator has an account for SurveyMonkey Apply.
2. Log in to your account.
3. Open the application to which you want to add a collaborator.
4. On the left-hand side of the page, click **Add Collaborator**. A pop-up window appears.
5. In the appropriate text box, enter the collaborator's email address.
6. Under **Type of access**, select the collaborator's permissions as **View & Edit** or **View Only**.
7. In the **Message** text box, enter an optional message to the collaborator.

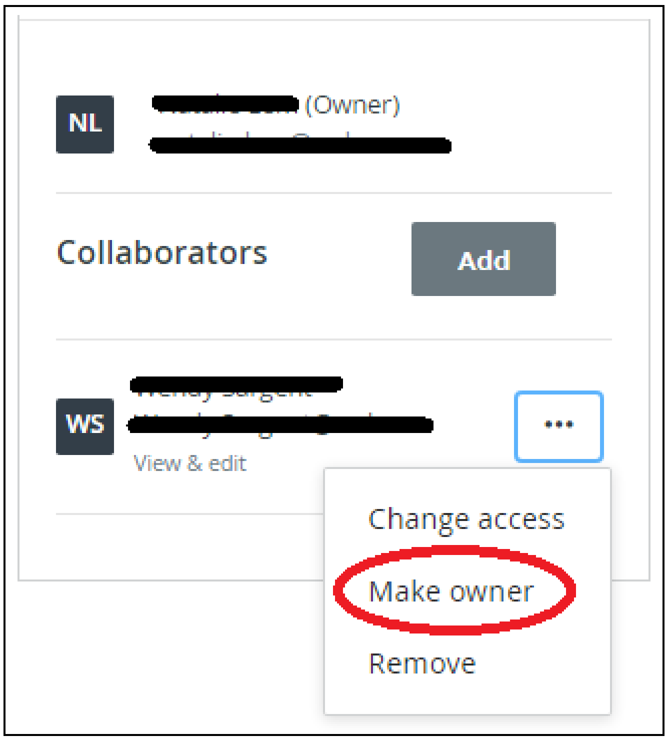


8. Click **Send Invite**.
9. The collaborator will receive the email invite, and they will have the choice to either **Join** or **Decline** the invite.
10. Once the collaborator clicks **Join**, they will need to log in to their account. Once they log in, they will be successfully added as a collaborator to the application.

Changing application ownership

To change the ownership of the application, do the following:

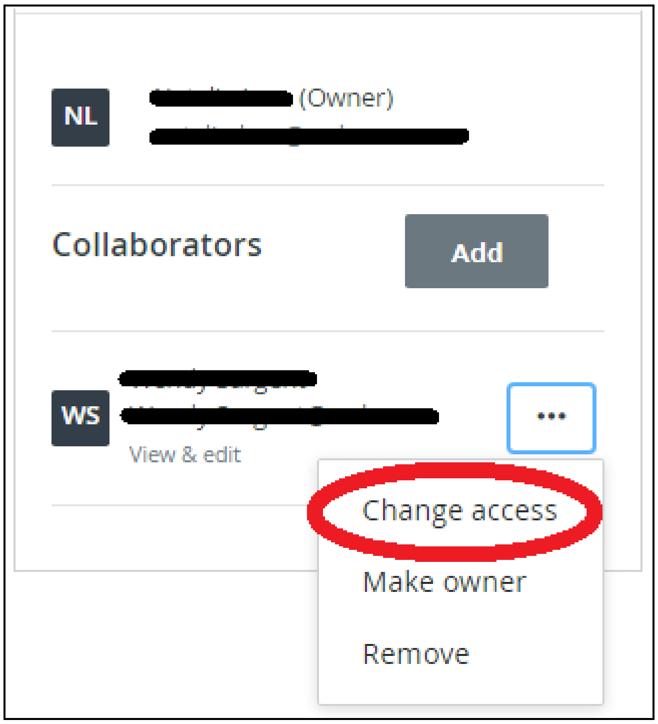
1. Ensure the person to whom you are transferring ownership is a collaborator. (See **Adding a collaborator to your application** on page 8.)
2. Log in to your account.
3. Open the application for which you want to change ownership. There is a list of collaborators on the left-hand side of the page.
4. Find the name of the collaborator to whom you want to transfer ownership and, to the right of the collaborator's name, click the **three dots**. A drop-down menu appears.
5. Select **Make owner**. Ownership of the application is automatically transferred to the collaborator.



Changing collaborator access

To change a collaborator's access, do the following:

1. Log in to your account.
2. Open the application for which you want to change the collaborator's access. The list of collaborators is on the left-hand side of the page.
3. Next to the name of the collaborator whose access you want to change, click the **three dots**. A drop-down menu appears.

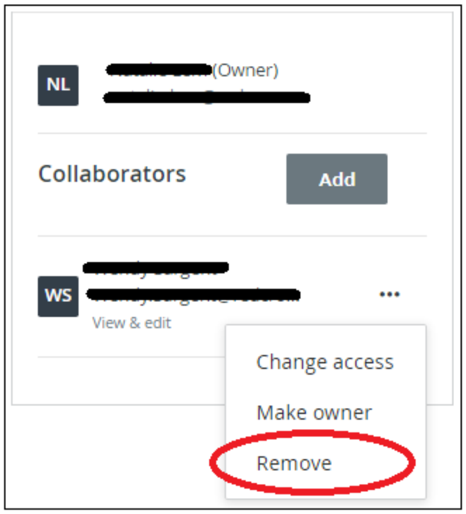


4. Select **Change Access**. The collaborator's access will be automatically changed to the other option available. For example, **View & Edit** will change to **View Only**, and vice versa.

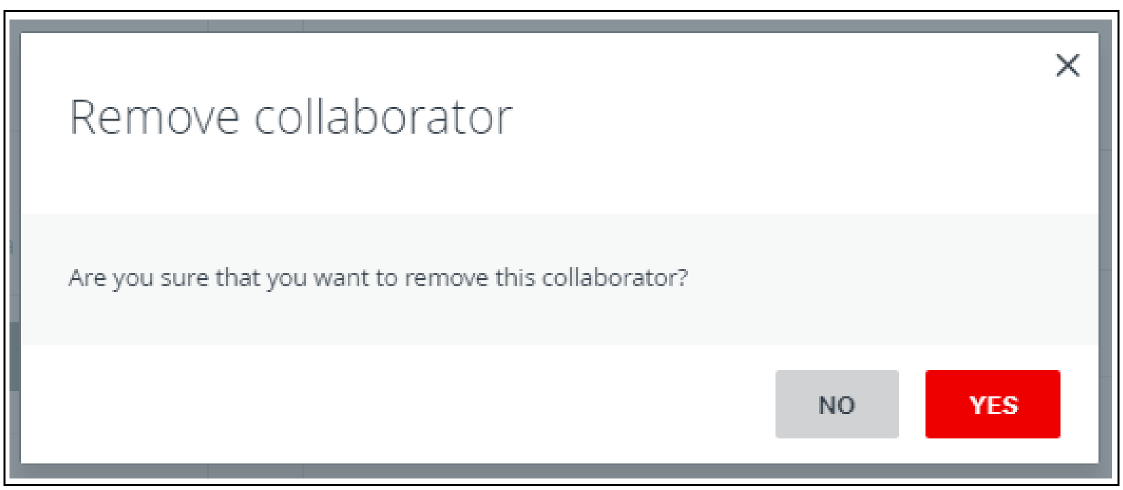
Removing a collaborator

To remove a collaborator, do the following:

1. Log in to your account.
2. Open the application from which you want to remove the collaborator. The collaborators are listed on the left-hand side of the page.
3. Next to the name of the collaborator you want to remove, click the **three dots**. A drop-down menu appears.
4. Select **Remove**.



5. A pop-up message appears, asking if you are certain you want to remove the collaborator. Click **Yes**. The collaborator is automatically removed.

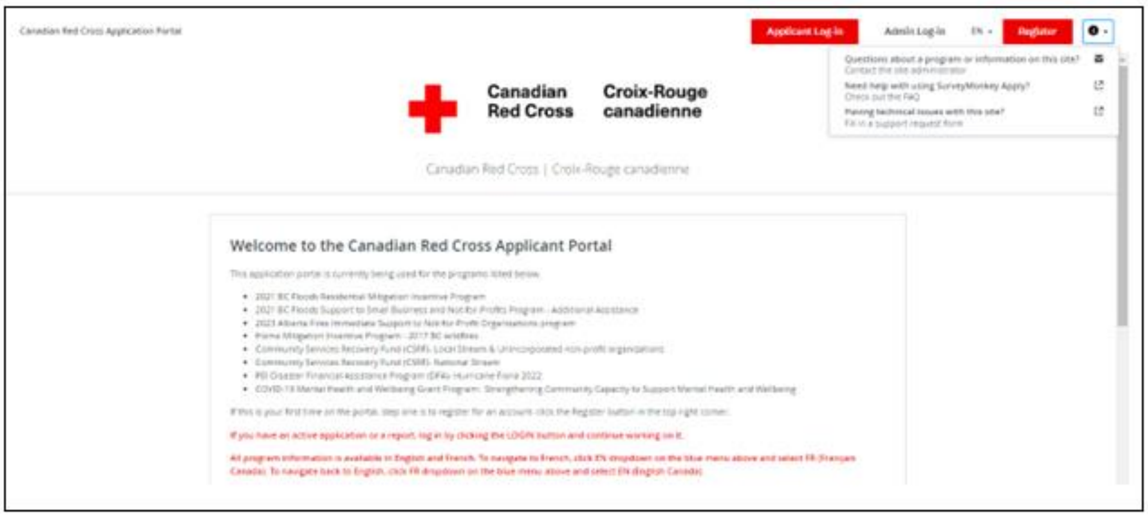


Resolving issues with your account

If you are having issues with your account set-up or with logging in, contact SurveyMonkey Apply support:

1. On any web-enabled computer or mobile device, go to https://redcross.smapply.ca.
2. At the top of the page on the right-hand side, click the **Information** icon. A drop-down menu appears with several options.

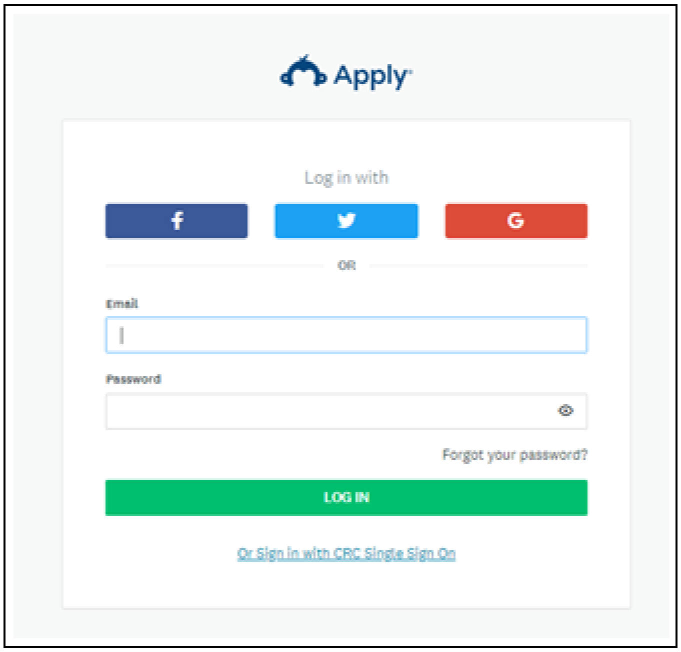
3. Select the option that is closest to what you need support with.



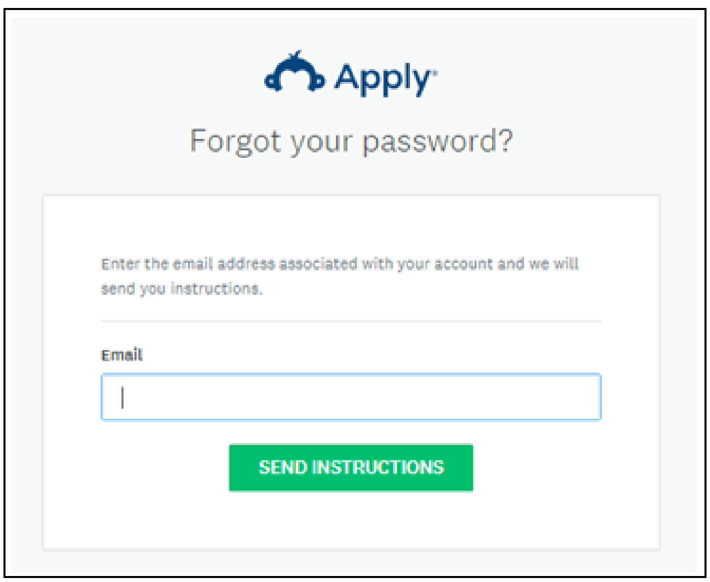
Resetting your password

If you need to reset your password, do the following:

1. Go to the **Canadian Red Cross SurveyMonkey Apply Homepage** at https://redcross.smapply.ca.
2. Click **Applicant Log-in**.
3. Under the **Email** and **Password** text boxes, click **Forgot your password?**. The **Forgot your password** page appears.



4. In the text box, enter the email address that you use to log in to the site.
5. Click **Send Instructions**.



6. The system will send instructions to the email you entered. If you cannot locate the email in your inbox, check your Spam or Junk folder.
7. Click the link within the email.
8. In the appropriate fields, enter a new password and confirm the password.
9. Click **Reset Password**.

	See SurveyMonkey Apply—General Account FAQ—How do I reset my password? https://help.surveymonkey.com/en/apply/faqs/account-faq/