Appendix A: Application Portal Instructions

Helpful Tips for IDEAS Program Grant Competition Applicants

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Click Here to Access the Application Portal

</div>

GETTING STARTED

- The 2025 IDEAS grant competition uses a new application platform. Even if you have previously applied for an IDEAS Program grant, all applicants will need to register with new accounts using the instructions below.
- Prospective applicants are able to preview the application without creating a new account. Primary applicants are able to invite collaborators to contribute to drafted applications.
- If you have difficulties with your account, please contact IDEAS@worldlearning.org. Please include "IDEAS Program 2025 Application – [Your Institution Name]" in the subject line.
    - Please include as much information as possible (including the name and email address you used to register) with your message to explain the problem. If possible, include screenshots.
    - Note that it may take up to 2-3 business days to receive a response to your question.

PLEASE FOLLOW STEPS 1-8 TO CREATE A PROFILE AND COMPLETE THE APPLICATION

Step 1: Create an Account

1. When initially accessing the Program Info page, the page will be in Preview Mode. Prospective applicants may navigate to the Eligibility Check to determine if they are eligible to apply and may preview the application phases using the toolbar on the left side of the screen.
2. When ready to begin an application, please click the "Apply" button in the top right corner.

IDEAS Program

Program Info

Apply

3. Use the "I'm a new user" section to create your account. All applicants will fill in their first name, last name, email, and create a password meeting the requirements mentioned on the page. Then select "Create Account." You will be prompted to enter a 6-digit code to verify your account email which will be sent to your account email address. Please check your spam/junk emails.
    a. Your username will be the email address you use when you register for the applicant portal. Write down your password and keep this information in a safe place. If you forget your password, you will need to reset it.
    b. Only one account needs to be created for each application. If multiple individuals are contributing to the application, contributors can be added after the application has been created (see Step 5).
    c. If you forget your password, DO NOT continue guessing your password. If you type the incorrect password a few times, you will be locked out of the account. If you cannot remember your password, please always click on the 'Forgot Password' link.
        i. Once you click the link, it will prompt you to create a new password and confirm it. In order to

finalize the new password, you will also need to enter the 6-digit code sent to your email set up with the account.

Step 2: Create or Edit a Profile

1. Once you have signed up your email and created a password, you will then be directed to create your organizational profile.
2. New accounts will start by clicking on the "Create New Organization" button. Do not click the "Search Existing Profiles" or "Create Using Guidestar" buttons. Enter all required information. Then select the "Create Organization" button. Note that you will not be able to start an application without creating a completed profile.

3. You may view or edit your institution profile any time by selecting "Back to Main Menu" text at the top of the left side of the screen. Select "Organization Profile" from the left side and select the "Edit Profile" button in the top right of the screen. Once any changes are made to the institutional profile, be sure to click the "Save Changes" button in the top right of your screen.
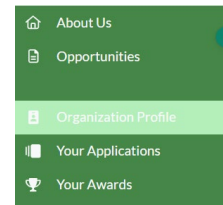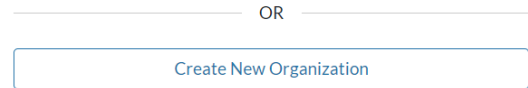
Step 3: Eligibility Check

1. Before starting a new application, you must complete an eligibility check. Respond to the three questions to determine if the project is eligible to submit an application.
   a. Read the questions carefully. If you accidentally select an incorrect response and are deemed ineligible, please email IDEAS@worldlearning.org so we can reset your account. All applicants must meet the listed eligibility criteria to be considered for an IDEAS grant.
2. Once you have completed the questions, select the "Check Eligibility" button in the bottom right corner of the screen.
3. If you are eligible, you will be brought to a screen that says "You are eligible!". From there, you may click the "Start Applying" button to begin your application.
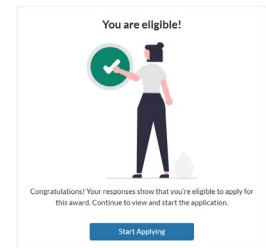
Step 4: Start a New Application

1. To create a new application, click the 'Start Applying' button at the bottom of the eligibility confirmation. This brings you to the Phase One Application Page.
2. On the screen, you will select the "Start" button next to each section to begin filling out your application. You can navigate between application sections by using the "Next," "Back," or "Exit Section" buttons at the bottom of the screen.
3. On the Phase One Application Page, once you begin entering information into the application, you can select the "Download Now" icon on the top of the page to download a PDF of the application. The icon will change to a "Download" button once the PDF has been generated. Select the "Download" button to download the PDF. On the top right of the page, you can select the "Review" button to view the application as it would be seen during the proposal review process.
4. Once you have started filling out a section, you may save a draft of your application at any time by selecting "Save Draft & Exit Section" at the bottom of the screen of any section. You can tell if your draft was saved successfully by checking the Phase One Application Page.

⊘ Draft Saved (Last edited on 9/12/2024 at 1:15 PM EST)

Step 5: Add Collaborators

1. You can add collaborators to your application by selecting the icon with three people on the top of the Phase One Application Page. Use this option to grant colleagues contributing to the application access to the portal.
2. Fill in the First Name, Last Name, and Email Address, and then select the role from drop-down menu.
   a. A lead applicant can edit and submit the application and will receive all email notifications about the application. A collaborator can edit the application but will not be able to submit the application and will not get any emails from the system.
   b. Roles can always be changed by selecting the gear icon next to the account and selecting "Edit Permissions." Select the role and click "Save" in the bottom right corner. There can be multiple lead applicants on an application, but there must always be at least one.
3. "Active" next to the gear icon indicates an active account. If the person invited does not have an account, they will receive an email prompting them to "Accept Invitation". The link will direct them to create a new account. If they do already have an account, they will receive an email prompting them to log in. Once logged in, they will be brought to the General Application Homepage. They can access the application by selecting "Your Applications" on the left side and selecting "Continue" for the 2025 Grant Competition cycle application.

Izzy Test 6 has invited you to contribute to an application for IDEAS Program on Zengine.

Click the button below to log in and accept your invitation to collaborate with World Learning Izzy Test on Zengine.

Accept Invitation

Izzy Test 6 has added you as a collaborator on an application for IDEAS Program on Zengine. Log in to the program portal https://world-learning.wizehive.app/organization/applications

Log In

Step 6: Return to Complete an Existing Application

1. Once you have started an application, you can return to it at any time until the application deadline. To return to an existing application, browse to the following link: https://world-learning.wizehive.app/program/ideas-program
2. Select "Log In" in the top right of the screen and enter your email address and password information. You will automatically be directed to the General Application Homepage. To navigate to your application, select "Your Applications" from the left side. This screen will list your in-progress applications. You can continue your existing application by selecting "Continue" for the 2025 Grant Competition cycle application. You will then be redirected to the Phase One Application Page to continue filling out your application.

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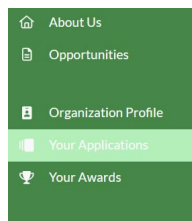
Status

Draft   Continue

Step 7: Track Your Progress

1. You can track your application progress on the General Application Homepage. To navigate back to the Homepage from your Phase One Application Page, click the "Back to Main Menu" text at the top of the left side of the screen. Then select "Your Applications" from the left side.

2. If the status bar says "Draft", that means that there is an action/step that you need to take before submitting (a field needs to be filled out, etc.). Additionally, application sections that have yet to be completed within your proposal will be marked with a red bar when required sections are incomplete.

3. If the status bar says "Under Review", your application is in a review status, and no action needs to be taken at the moment.
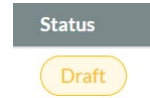
Step 8: Submit Application

1. Once you have completed all required sections of the application, click the green "Submit" button in the top right of the screen. Once you click the green "Submit" button, you will no longer be able to edit your application. **Your application is not fully submitted until you click the green "Submit" button.**

2. If anything is incomplete, you will receive an error message. The incomplete sections will be highlighted in red.

3. When it has been submitted successfully, you will receive a message that says, "Phase 1 Proposal Submitted!" Lead applicants will receive an automated email confirming the submission of your application. On the General Application Homepage, your status should show as blue "Submitted". **Please ensure you receive this confirmation of submission email and that your status is listed as "Submitted".**

Phase 1 Proposal Submitted!

Congratulations for submitting your form - great work!

Go to Your Applications

Status

Submitted
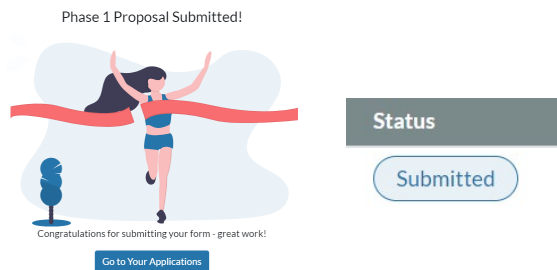
Contact World Learning for assistance: If you have question or if you need help completing your application, email IDEAS@worldlearning.org. Please include "IDEAS Program 2025 Application – [Your Institution Name]" in the subject line.