

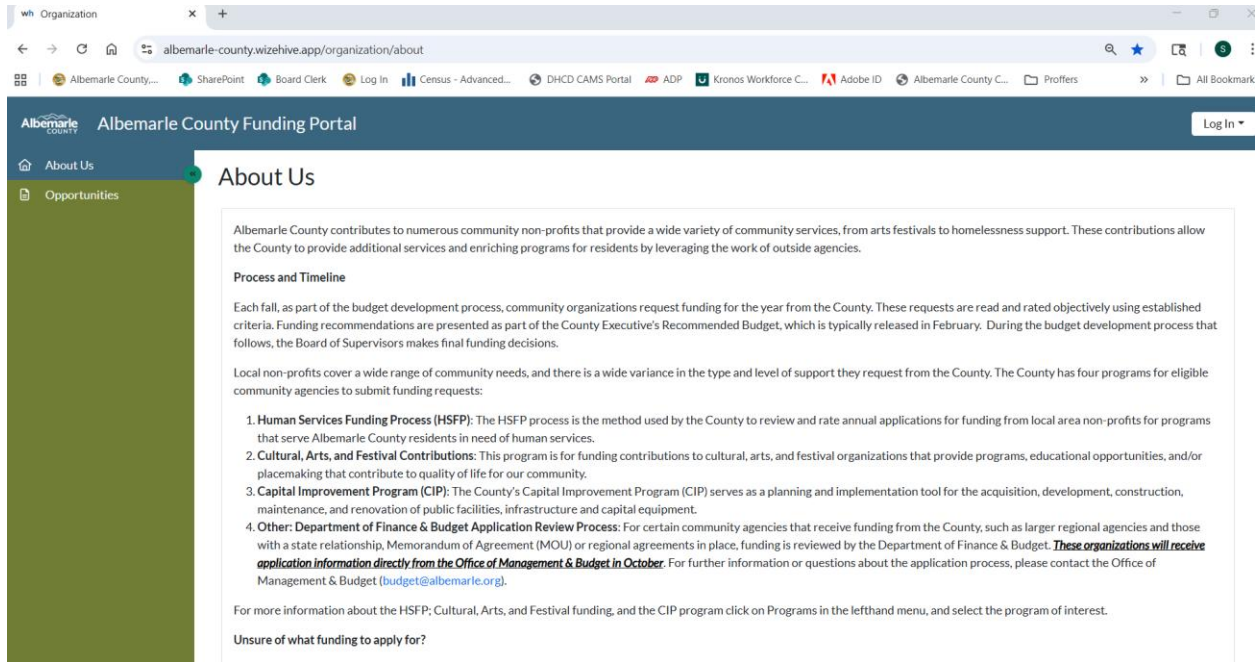


## NextZen Applicant Guide

Following is a step-by-step guide to help you set up your organizational account in the new NextZen Funding Portal. The guide uses the Human Services Funding Process (HSFP) for the tutorial, but the steps are the same for the Arts & Cultural, and Community Nonprofit Capital Improvement Program applications. Please reach out to Stacy Pethia ([spethia@albemarle.org](mailto:spethia@albemarle.org)) with any questions.

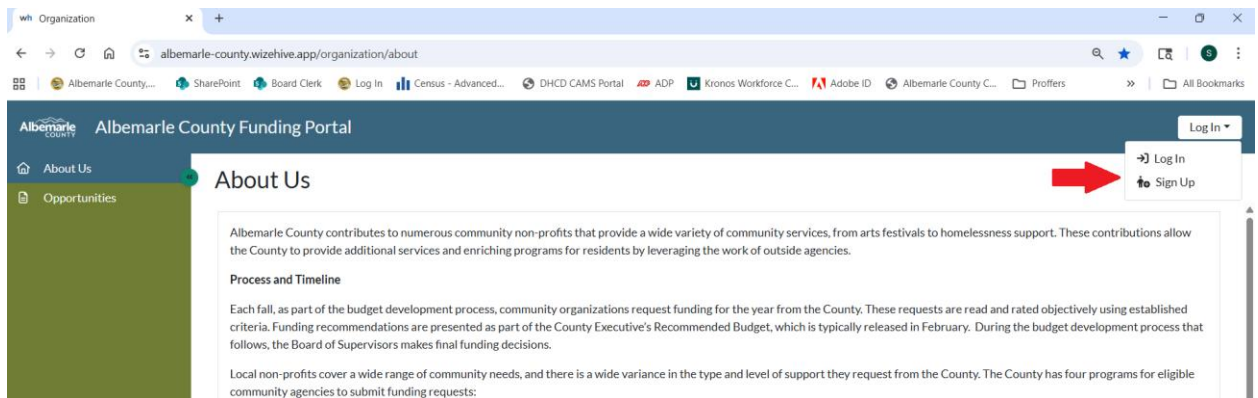
# Setting Up Your Account

1. Home page: <https://albemarle-county.wizehive.app/organization/about>



2. Set up account

- Click on the **LOG IN** button in the upper right corner of the page and select 'Sign Up'



- On the **I'M A NEW USER TAB**, fill in your name and email address, and create a password for the site. Click 'Create Account'.

wh Identity

albemarle-county.identity.wizehive.app/signup?state=FRm5M9LlBG3WlScPMJgP3QDREny59jdGLxoB&trace=1CTAdj1CY1U68pSHKlCF7

Albemarle County... SharePoint Board Clerk Log In Census - Advanced... DHCD CAMS Portal ADP Kronos Workforce C... Adobe ID Albemarle County C... Proffers

I'm a new user I already have an account

### Create an account for Albemarle County

Signup with Google

OR

First name Last name

Email

Password Confirm

Use 6 or more characters, including at least one upper case character and one lower case character and one digit.

Create Account

You agree to the software's [Terms of Service](#) and [Privacy Policy](#).

- You will be sent a 6-digit confirmation code to the email address you provided. Enter that 6-digit code into the boxes and click 'Next'.

wh Identity

albemarle-county.identity.wizehive.app/local/email/verify?state=FRm5M9LlBG3WlScPMJgP3QDREny59jdGLxoB&trace=1CTAdj1CY1U68pSHKlCF7&send=true

Albemarle County... SharePoint Board Clerk Log In Census - Advanced... DHCD CAMS Portal ADP Kronos Workforce C... Adobe ID Albemarle County C... Proffers

### Welcome

spethia+5@albemarle.org

To continue, verify code sent to ...

spethia+5@albemarle.org

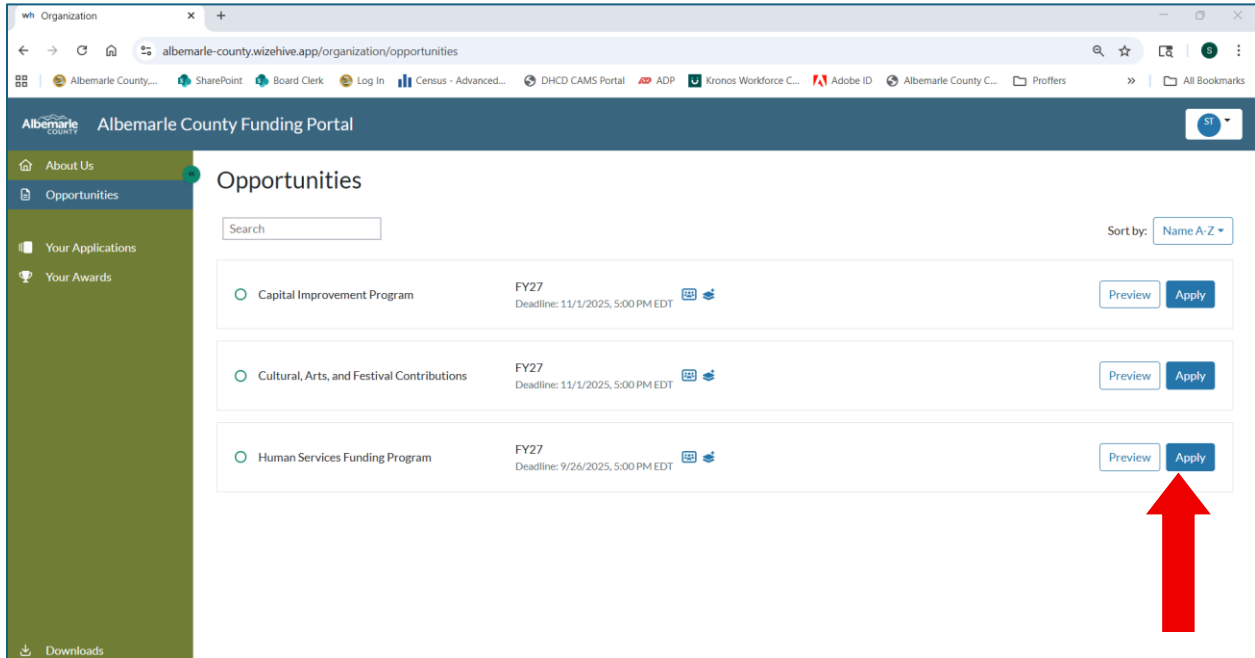
[Send new code?](#)

Next

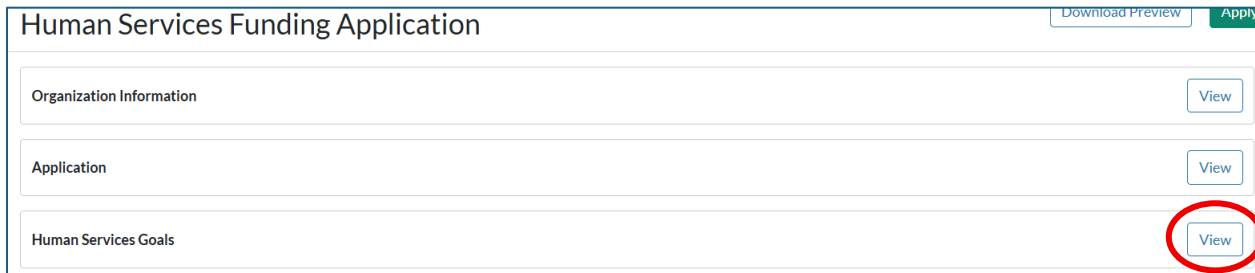
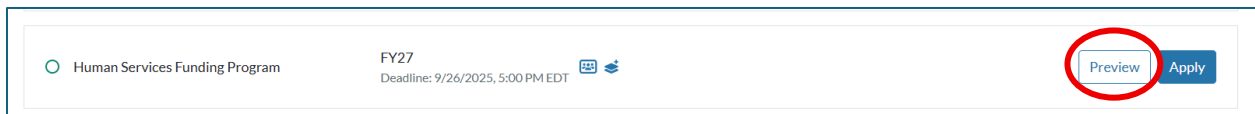
Your account is now set up!

## Completing and Submitting Your Application

1. Once you enter the account verification code and click 'Next', the **OPPORTUNITIES** page will open. All funding programs that are actively accepting applications will be shown here.



2. Find the program you want to apply to, and click on the blue Apply button located on the righthand side of the screen (see screenshot above).
  - If you want to preview the questions before you start working on an application, click on the white 'Preview' button, then select the white 'View' button next the application section you wish to preview.



3. You will now be asked to create your organizational profile.

- **IF YOU A RETURNING APPLICANT**

- Organizational profiles for all who submitted applications last year were transferred to the NextZen portal during the set up.
- To find your existing profile, your can search by your **ORGANIZATION NAME** or by your **ORGANIZATION EIN**.
- Make sure the 'Are you a tax-exempt organization' button is checked.
- Click 'Search Existing Profiles'.

The screenshot shows the 'Albemarle County Funding Portal' interface. On the left is a green sidebar with navigation options: 'Back to Main Menu', 'Program Info', 'Eligibility Check', 'Your Applications', 'Intake', and 'Human Services Funding Application'. The main content area displays a message: 'No Organization Profile Associated. Your account is not associated with an organization. In order to continue with your application, click Create New Organization below.' Below this message are two radio button options: 'Search by Organization Name' and 'Search by Organization EIN', both with empty text input fields. A red rectangular box highlights these two options. Below the radio buttons is a checked checkbox labeled 'Are you a tax-exempt organization?'. Underneath are two buttons: 'Search Existing Profiles' and 'Create Using GuideStar'. A red arrow points upwards to the 'Search Existing Profiles' button. Below these buttons is an 'OR' separator and a 'Create New Organization' button. At the bottom is a 'Back' link.

- **IF YOU ARE A FIRST TIME APPLICANT**

- Click on either the 'Create Using GuideStar' button, or the 'Create New Organization' button. Again, make sure the box next to 'Are you a tax exempt organization' is checked.

This screenshot is a close-up of the bottom portion of the form shown in the previous image. It focuses on the 'Are you a tax-exempt organization?' checkbox, which is checked and circled in red. Below it are the 'Search Existing Profiles' and 'Create Using GuideStar' buttons. A red arrow points to the 'Create Using GuideStar' button. Below these is an 'OR' separator and the 'Create New Organization' button, with another red arrow pointing to it. The 'Back' link is visible at the bottom.

- Fill in all boxes on the Organizational Profile Page. If you chose the create your profile GuideStar, many of the boxes will already be filled in.
- Click on **CREATE ORGANIZATION**

The screenshot shows the 'Albemarle County Funding Portal' interface. On the left is a green sidebar menu with options: 'Back to Main Menu', 'Program Info', 'Eligibility Check', 'Your Applications', and 'Intake' (expanded to show 'Human Services' and 'Funding Application'). The main content area contains a form with the following sections:
 

- 'Website' with a text input field.
- 'Executive Director' with five input fields: 'First Name', 'Last Name', 'Role or Title', 'Email Address', and 'Phone Number'.
- 'Organization Contacts' with four input fields: 'First Name', 'Last Name', 'Role or Title', and 'Email Address'.
- An 'Add Contact' button with the text 'You can add 9 more contacts'.
- A large blue 'Create Organization' button at the bottom, which is highlighted with a red arrow pointing to it from the right.
- A 'Back' link below the 'Create Organization' button.

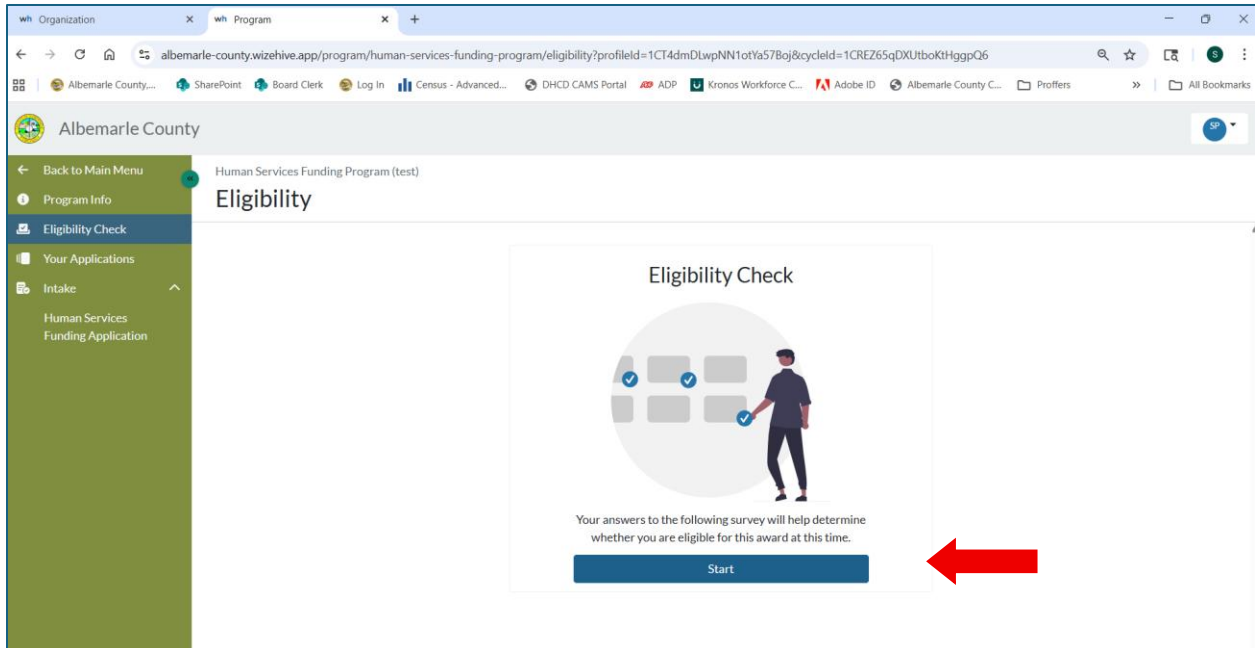
- You can now add up to 9 contacts for your organization. Simply click the 'Add Contact' button found at the bottom lefthand side of the page.

This screenshot shows the same 'Albemarle County Funding Portal' interface as the first image, but with the 'Add Contact' button circled in red. The 'Organization Contacts' section now contains three rows of input fields. The 'Email Address' field in each row has a red 'x' next to it, indicating a validation error. The 'Add Contact' button is now labeled 'Add Contact' and the text below it says 'You can add 7 more contacts'.

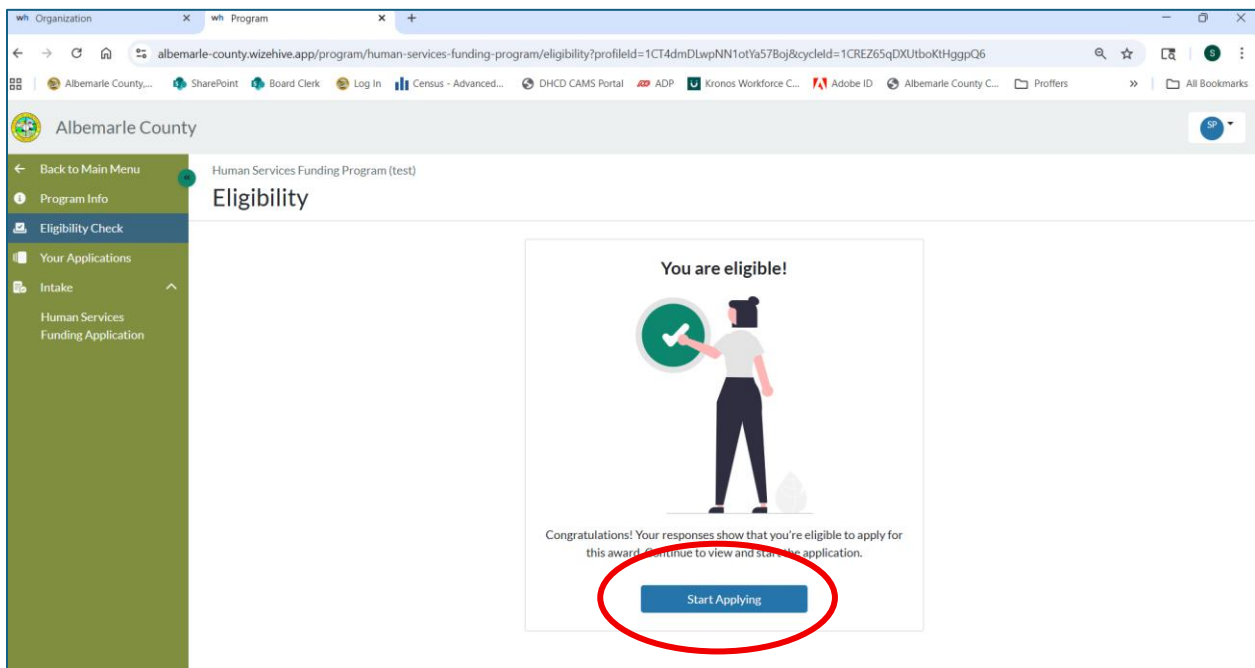
- NextZen allows more than one organization staff member to work on an application. Please refer to the How to Add Collaborators sections for instructions.

4. The next step is to determine your eligibility to apply for funding.

- Click the blue 'Start' button

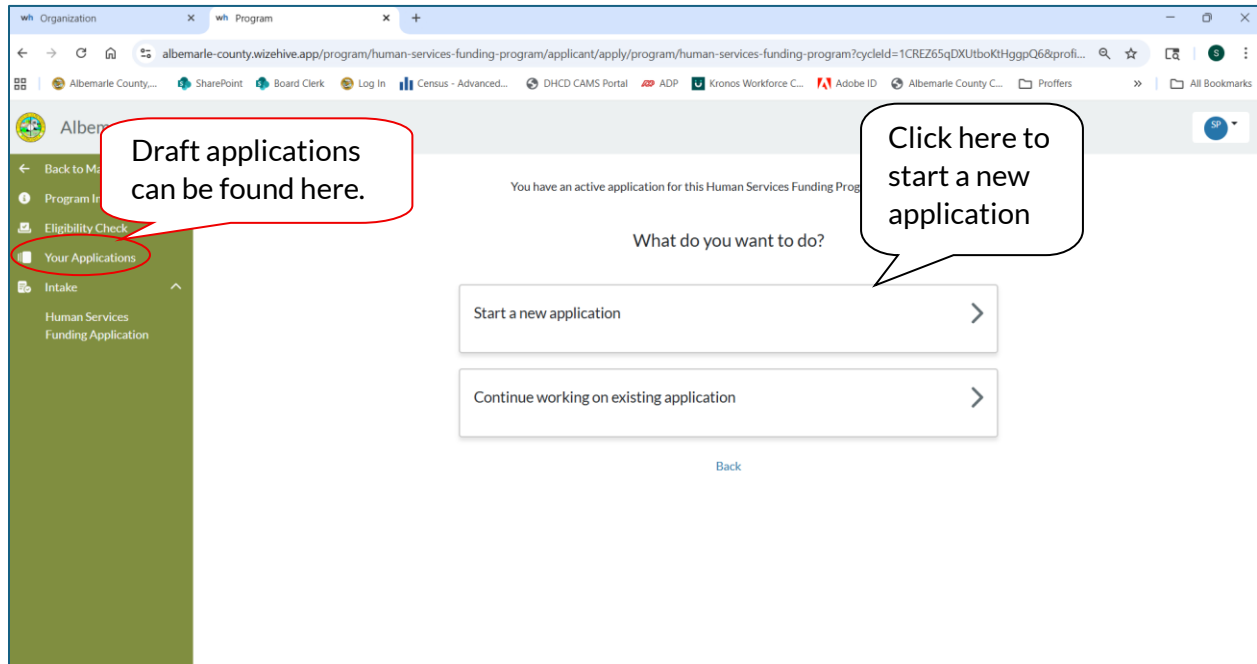


- Answer each of the eligibility questions, and click the blue 'Check Eligibility' button in the bottom right corner of screen.
- If your organization is eligible to apply for HSFP funding, a blue 'Start Applying' button will display on the screen. Click this button to proceed to the application form.

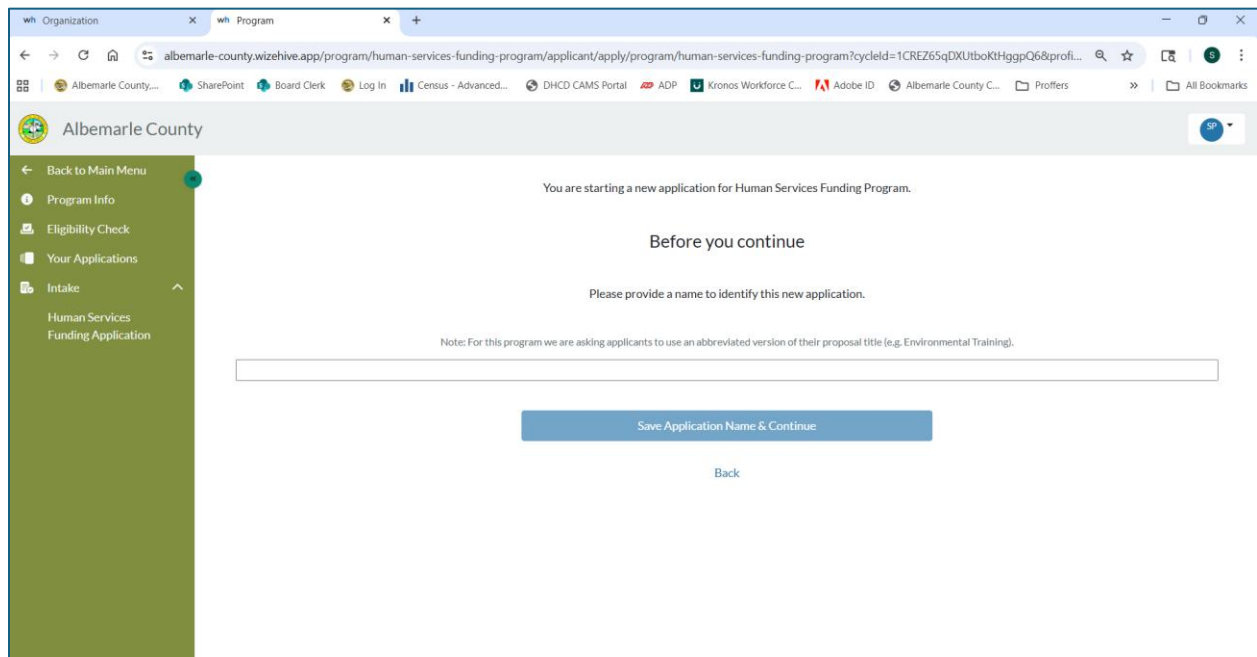


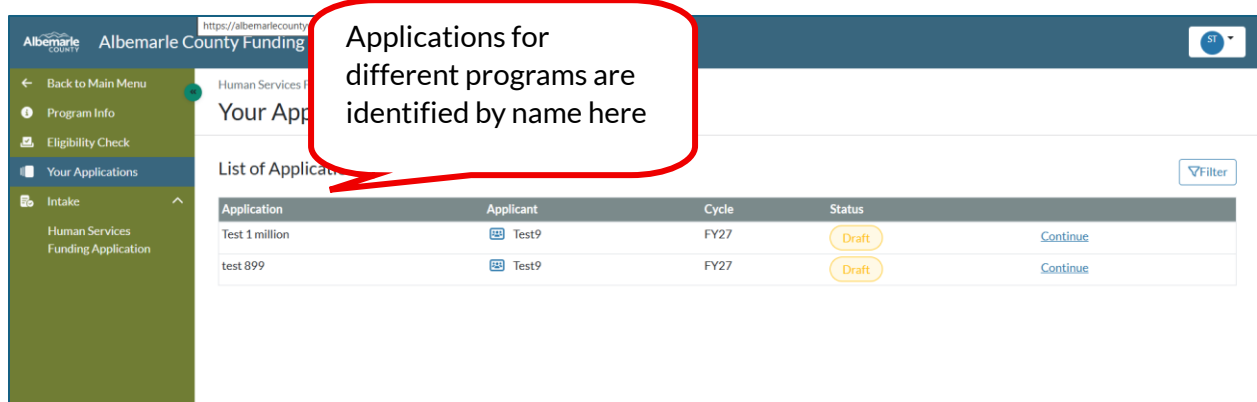
5. Once you click the 'Start Applying' button, you will be directed to the **YOUR APPLICATIONS** page. Your work will be automatically saved as a draft as you complete each section, and you

can access draft applications from this page by clicking on the 'Continue working on existing application'. For now, as this is the first application round in NextZen, you will need to select 'Start a new application'.

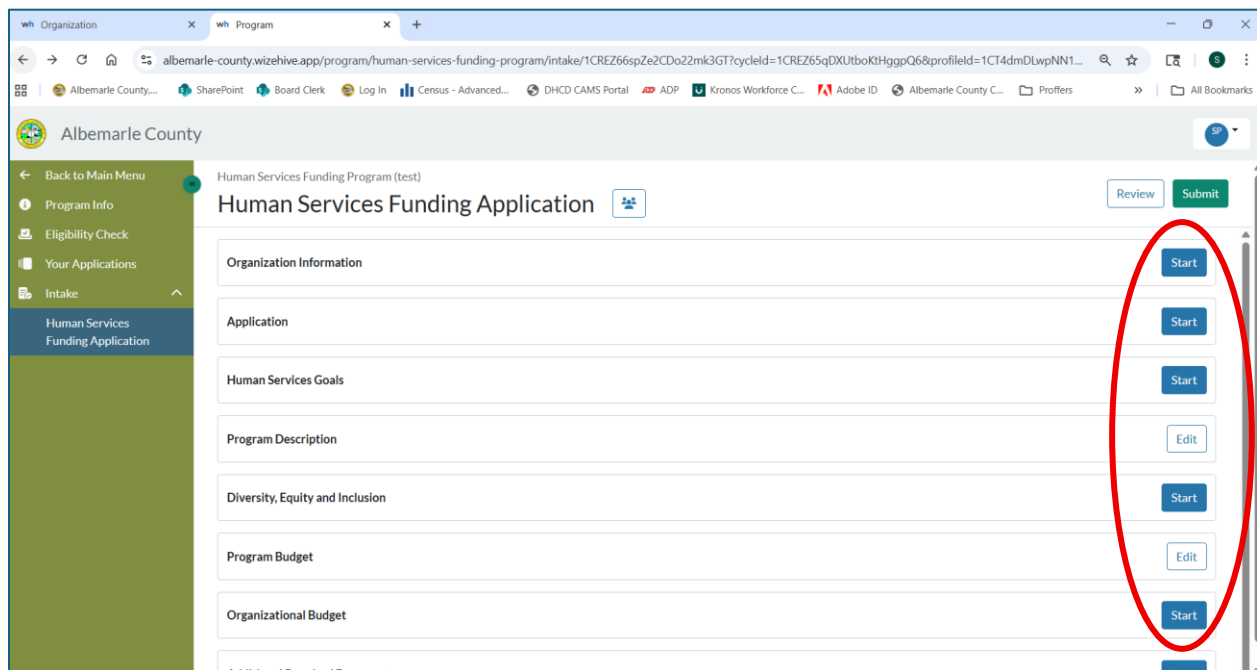


6. Select a name for the application. It is recommended you use a shortened version of program for which you are applying for funding. Click the blue 'Save Application Name & Continue' button. If you will be submitting applications for more than one program, this name will help you identify each application on the **YOUR APPLICATIONS** page.

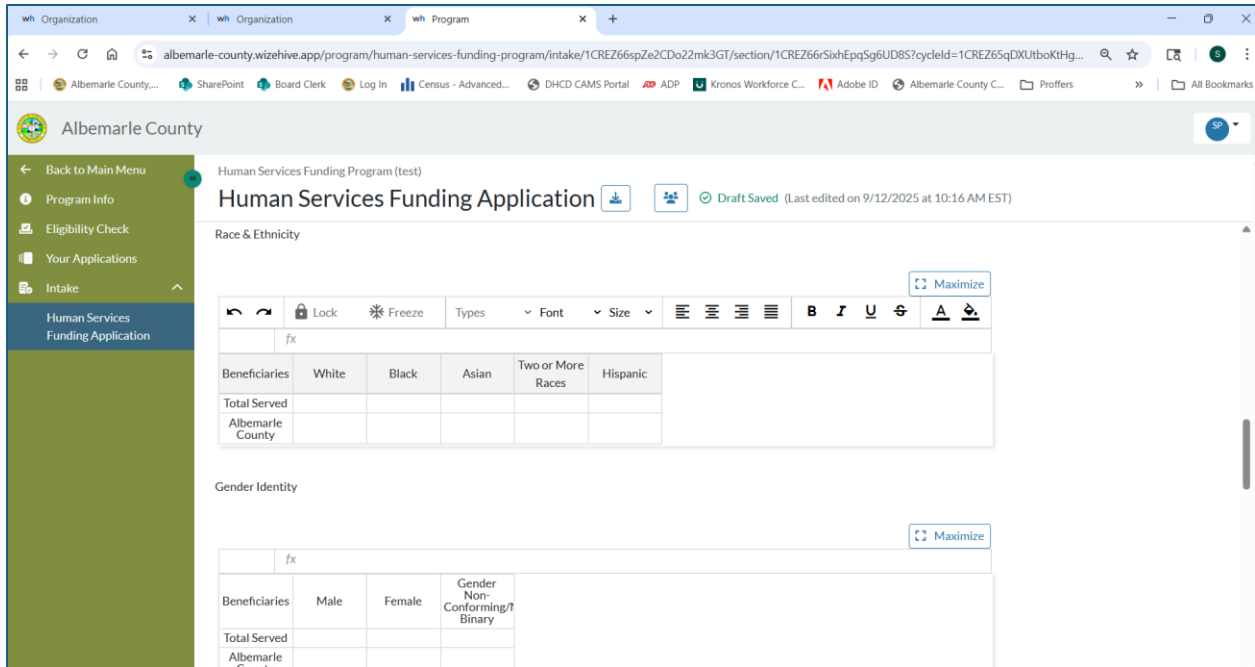




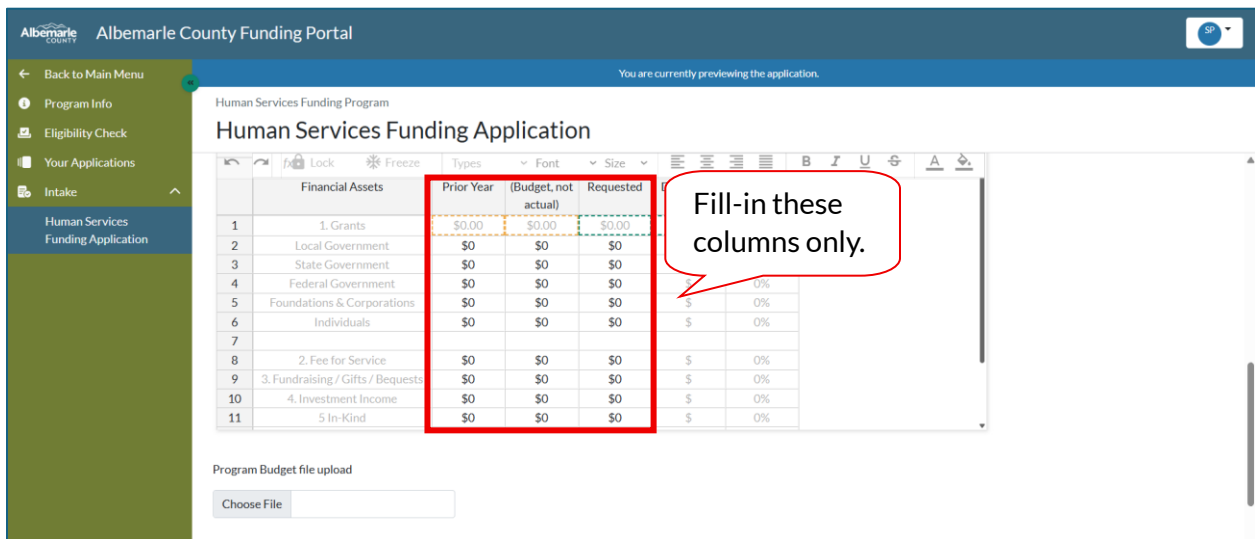
- NextZen organizes the application into sections that can be completed independently. To begin each section, click on the blue 'Start' button located on the righthand side of the screen. Your work is saved automatically, and the blue 'Start' button changes to a white 'Edit' button once you start working on a section. You can edit each section until you submit your application.



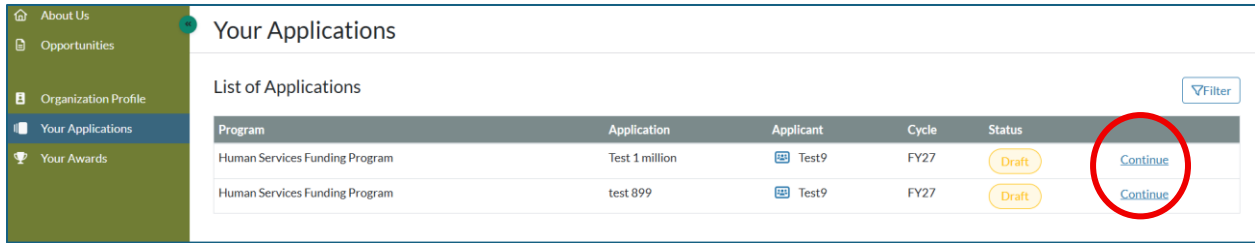
- Tables are now embedded in the application itself.



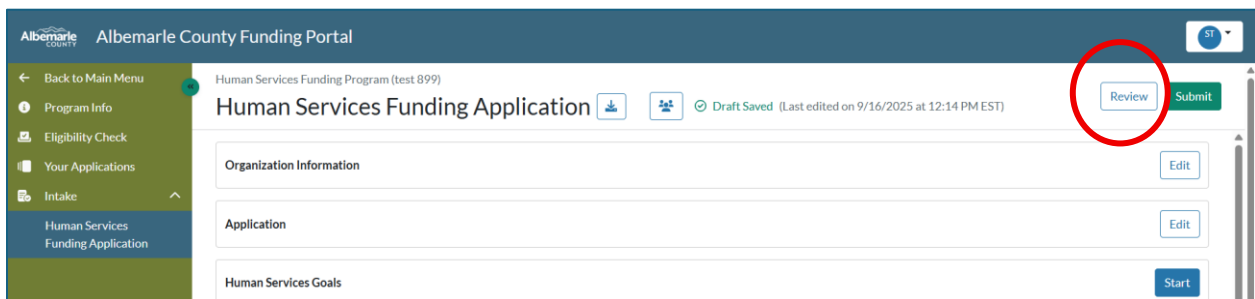
For the table in the Program Budget section, you are only able to fill-in the cells in columns B, C & D. The table automatically calculates the amounts in columns E & F. You may also upload a .pdf copy of your program budget to provide more information. However, ***you must complete the budget table in NextZen.***



- To continue working on a draft application, navigate to the **YOUR APPLICATIONS** page, find the program application, and click 'Continue'.



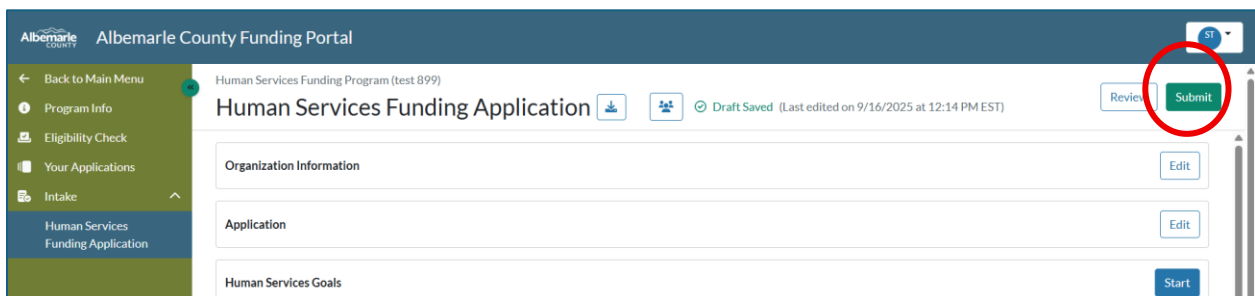
10. Once you have completed all sections of the application, you can review your work by clicking on the white 'Review' button located above the list of application sections. The full application will be displayed on your screen.



11. Once you have finished your review, you may submit the application by either clicking the green 'Submit' button at the bottom of the review page, or select the white 'Back' button if you are not yet ready to submit the application.

You will be unable to submit your application if you have missed any of the mandatory questions. If this happens, look for the application section(s) highlighted in red, open that section and search for the missed answer.

12. Clicking the 'Back' button will return you to the application home page. Once all reviews are complete, you can submit your application from here by clicking the green 'Submit' button in the top right corner of the page.



13. You will receive confirmation on a successful submission. Confirmation will also be sent to your email.

Human Services Funding Application Submitted!



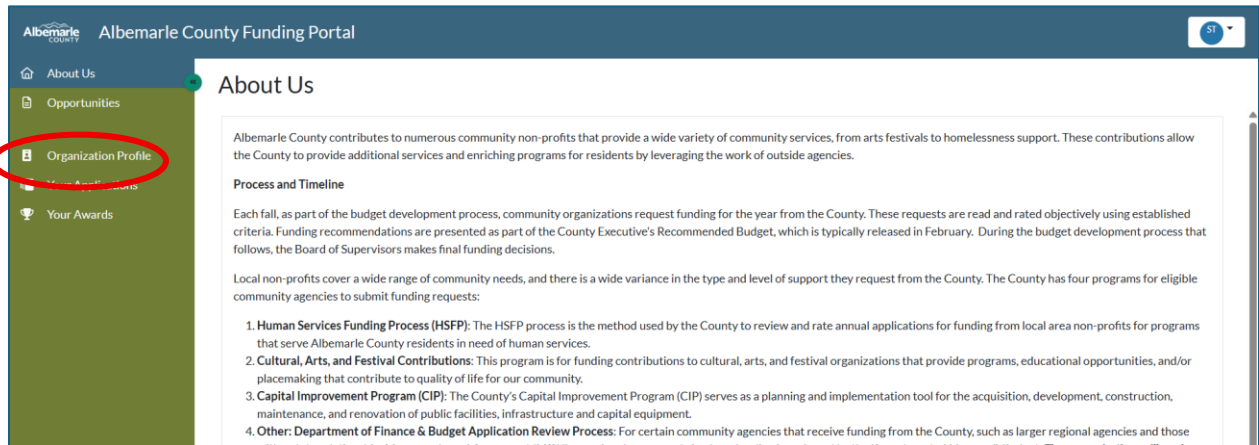
Congratulations for submitting your form - great work!

[Submit Another Application](#) [Go to Your Applications](#)

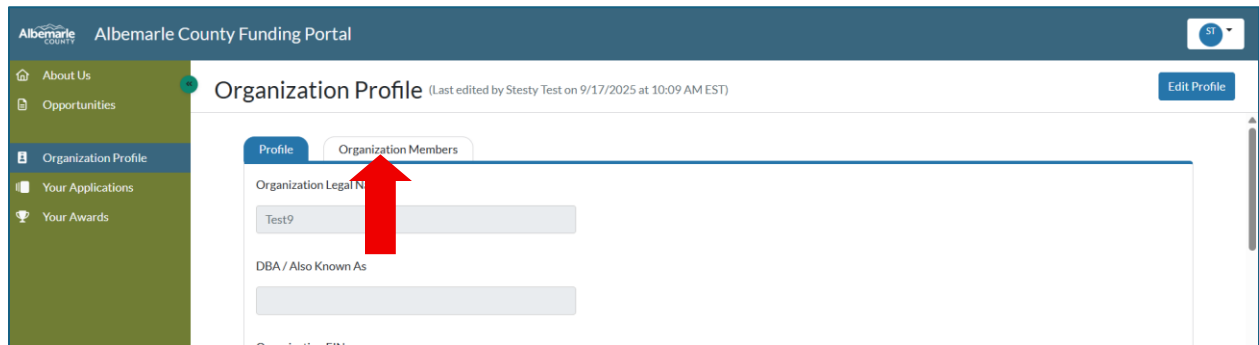
The image is a confirmation message for a submitted application. It features a central illustration of a woman with long dark hair, wearing a blue athletic top and shorts, running through a red ribbon. The background is light blue with abstract shapes. Below the illustration is a congratulatory message. At the bottom, there are two buttons: 'Submit Another Application' and 'Go to Your Applications'.

# How to Add Collaborators

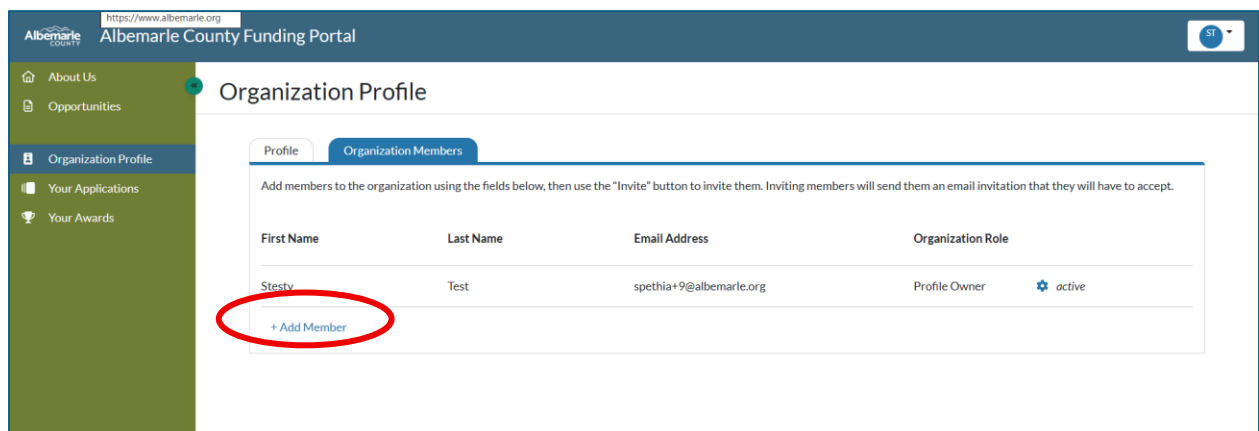
1. Navigate to the **ORGANIZATION PROFILE** page.



2. Click on the 'Organization Members' tab.



3. Click on '+ Add Member'.



4. Enter the first and last names, and the email address of the person or person(s) you want to add to your organization.
5. Assign them the role of Organizational Member. This role will allow new members to collaborate on the application but not submit the application. **Only the Profile Owner can submit an application.**
6. Click 'Invite'. The new member will receive an email with instructions on how to set up a password.

The screenshot displays the 'Organization Profile' page in the Albemarle County Funding Portal. The page has a dark blue header with the 'Albemarle County' logo and 'Albemarle County Funding Portal' text. A green sidebar on the left contains navigation links: 'About Us', 'Opportunities', 'Organization Profile' (highlighted), 'Your Applications', and 'Your Awards'. The main content area is titled 'Organization Profile' and has two tabs: 'Profile' and 'Organization Members' (selected). Below the tabs is a text box: 'Add members to the organization using the fields below, then use the "Invite" button to invite them. Inviting members will send them an email invitation that they will have to accept.' Below this is a table with columns: 'First Name', 'Last Name', 'Email Address', and 'Organization Role'. The table contains one row: 'Stesty', 'Test', 'spethia+9@albemarle.org', and 'Profile Owner' with a gear icon and the word 'active'. Below the table is a form to add new members, highlighted with a red box. The form has three input fields: 'First Name', 'Last Name', and 'Email Address'. Below these is a dropdown menu for 'Organization Role' with 'Select Role' and a downward arrow. To the right of the dropdown is an 'Invite' button. Below the dropdown are two options: 'Profile Owner' and 'Organization Member'.