



FLORIDA ASSOCIATION OF  
**FREE & CHARITABLE**  
CLINICS

# State Funds Grant Program:

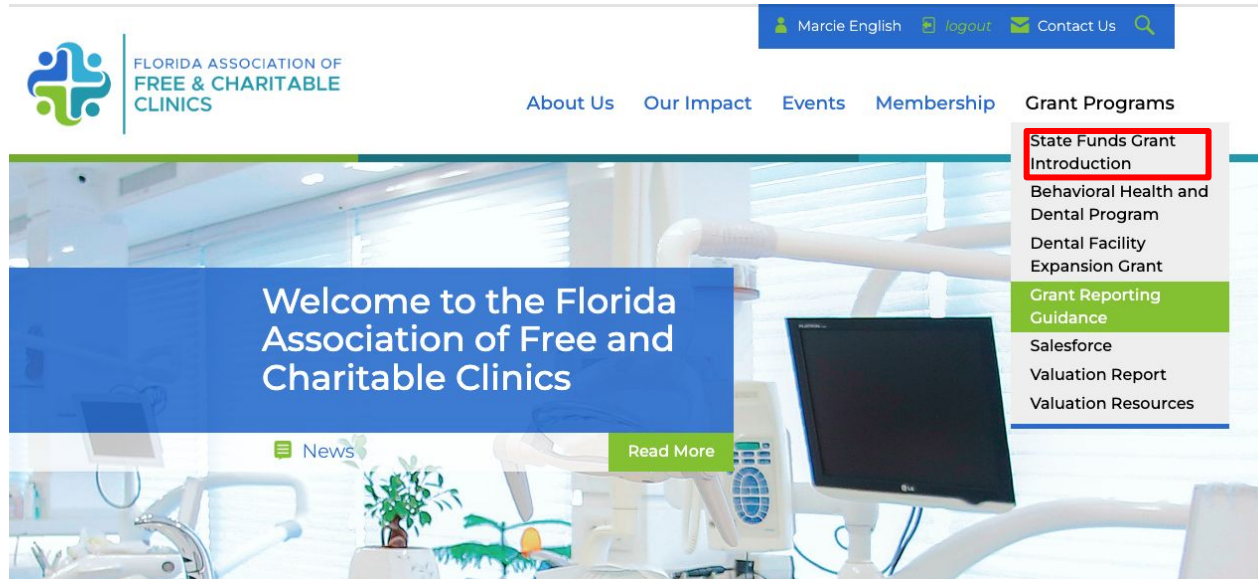
## Account Navigation & Application Demo

# Agenda

- 1. Introduction**
  - **Locating you the Application**
- 2. Wizehive Review**
  - **Account Setup**
  - **Navigation**
  - **Saving, Sharing, and Submitting**
- 3. Wizehive Demo**
  - **Walkthrough of the Application**
- 4. Conclusion**
  - **Best Practices**
  - **Next Steps**
  - **Questions**

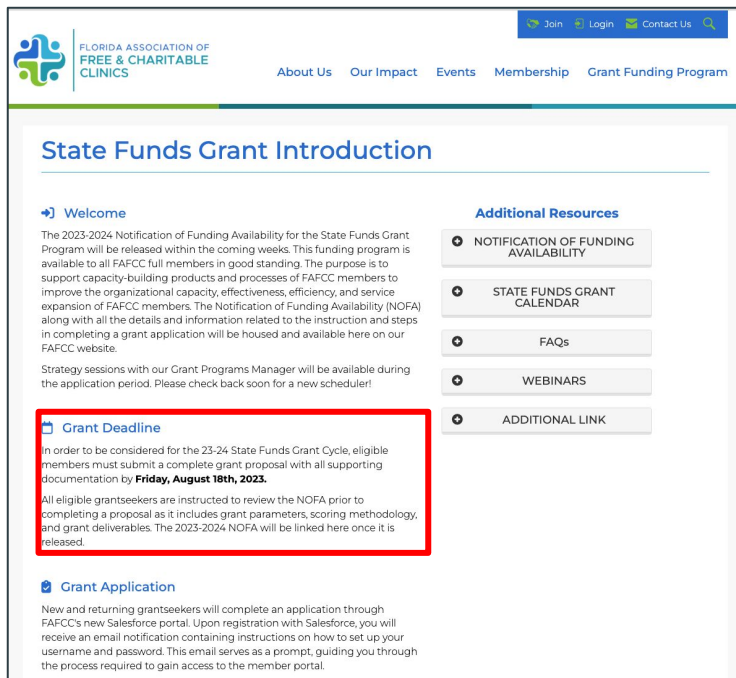
# Intro: Locating Salesforce

The application and all resources (application copy, copies of slides) can be found on our website: <https://www.fafcc.org/page/Grantintro>



# Intro: Locating Salesforce

The **Application (Salesforce Portal)** will be found in the Grant Reporting drop-down menu on [fafcc.org](https://fafcc.org)



The screenshot shows the website of the Florida Association of Free & Charitable Clinics. The header includes the logo, navigation links (About Us, Our Impact, Events, Membership, Grant Funding Program), and user options (Join, Login, Contact Us). The main content area is titled "State Funds Grant Introduction". It features a "Welcome" section with a paragraph about the 2023-2024 Notification of Funding Availability (NOFA) and a "Grant Deadline" section highlighted by a red box. The "Grant Deadline" section states that eligible members must submit a complete grant proposal by Friday, August 18th, 2023. To the right of the main text is a column of "Additional Resources" with links to the NOFA, the grant calendar, FAQs, webinars, and an additional link. A "Grant Application" section is partially visible at the bottom.

**FLORIDA ASSOCIATION OF FREE & CHARITABLE CLINICS**

Join Login Contact Us

About Us Our Impact Events Membership Grant Funding Program

## State Funds Grant Introduction

### Welcome

The 2023-2024 Notification of Funding Availability for the State Funds Grant Program will be released within the coming weeks. This funding program is available to all FAFCC full members in good standing. The purpose is to support capacity-building products and processes of FAFCC members to improve the organizational capacity, effectiveness, efficiency, and service expansion of FAFCC members. The Notification of Funding Availability (NOFA) along with all the details and information related to the instruction and steps in completing a grant application will be housed and available here on our FAFCC website.

Strategy sessions with our Grant Programs Manager will be available during the application period. Please check back soon for a new scheduler!

### Grant Deadline

In order to be considered for the 23-24 State Funds Grant Cycle, eligible members must submit a complete grant proposal with all supporting documentation by **Friday, August 18th, 2023**.

All eligible grantseekers are instructed to review the NOFA prior to completing a proposal as it includes grant parameters, scoring methodology, and grant deliverables. The 2023-2024 NOFA will be linked here once it is released.

### Grant Application

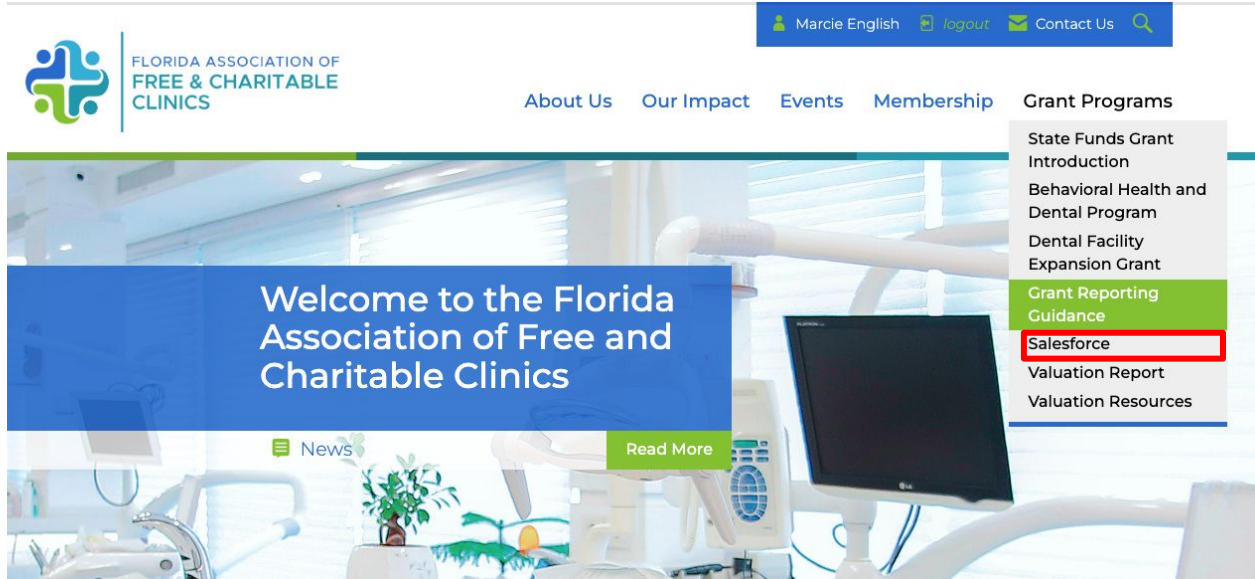
New and returning grantseekers will complete an application through FAFCC's new Salesforce portal. Upon registration with Salesforce, you will receive an email notification containing instructions on how to set up your username and password. This email serves as a prompt, guiding you through the process required to gain access to the member portal.

### Additional Resources

- NOTIFICATION OF FUNDING AVAILABILITY
- STATE FUNDS GRANT CALENDAR
- FAQs
- WEBINARS
- ADDITIONAL LINK

# Intro: Locating WizeHive

Grantees can also take a more direct route to Salesforce



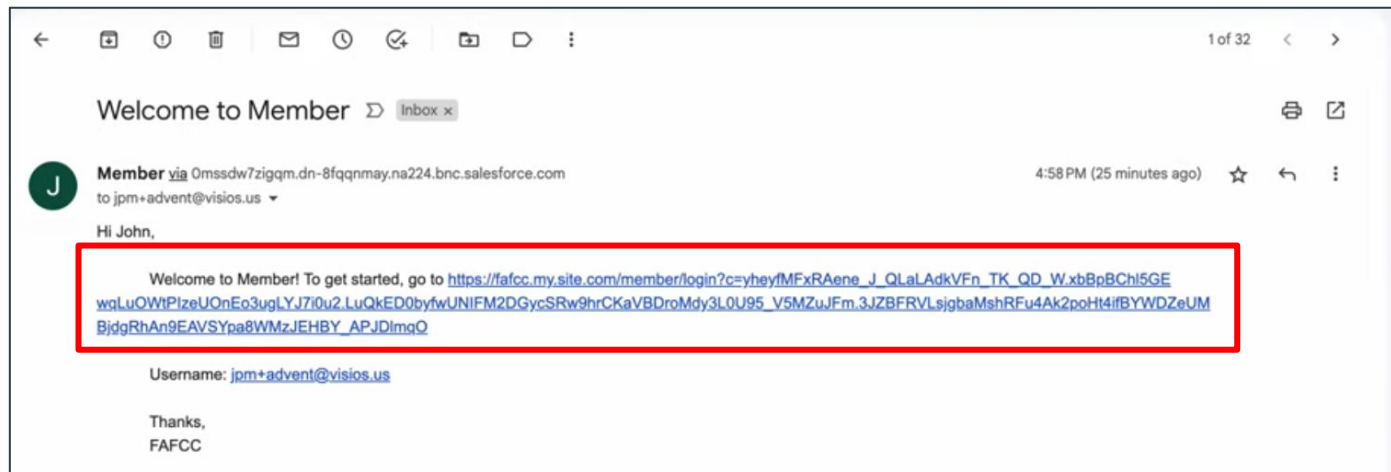
The screenshot shows the website of the Florida Association of Free & Charitable Clinics. The header includes the logo and navigation links: About Us, Our Impact, Events, Membership, and Grant Programs. The Grant Programs dropdown menu is open, showing options like State Funds Grant Introduction, Behavioral Health and Dental Program, Dental Facility Expansion Grant, Grant Reporting Guidance, Salesforce (highlighted with a red box), Valuation Report, and Valuation Resources. The main content area features a large blue banner with the text 'Welcome to the Florida Association of Free and Charitable Clinics' and a 'Read More' button. Below the banner is a 'News' section with a small image of a dental office.

**https:**<https://fafcc.my.site.com/member/s/>

# Salesforce: Account Setup

The Project Liaison that FAFCC has on file will be sent a salesforce invitation to their email. For first time grantees, FAFCC will use the primary contact on file. Mark [jpm+fafcc@visios.us](mailto:jpm+fafcc@visios.us) as a safe sender.

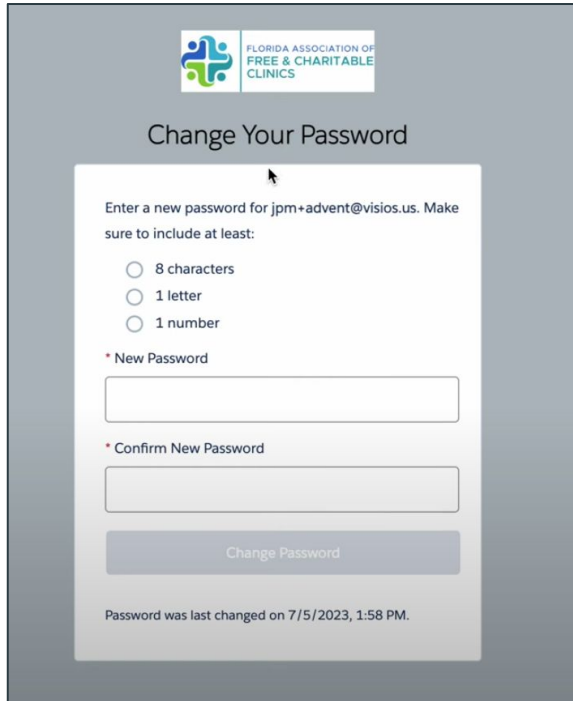
Click the link within the email



Please notify FAFCC immediately if there has been a change in Project Liaison for the 23-24 Grant Cycle.

# Salesforce: Account Setup

After clicking on the link, you will be directed to a screen titled "Change Your Password."



The screenshot shows a web form titled "Change Your Password" for the Florida Association of Free & Charitable Clinics. The form is set for the user jpm+advent@visios.us. It includes instructions to enter a new password that meets specific requirements: at least 8 characters, 1 letter, and 1 number. There are two input fields: "New Password" and "Confirm New Password". A "Change Password" button is at the bottom. A status message at the very bottom indicates the password was last changed on 7/5/2023 at 1:58 PM.

FLORIDA ASSOCIATION OF  
FREE & CHARITABLE  
CLINICS

### Change Your Password

Enter a new password for jpm+advent@visios.us. Make sure to include at least:

- ☐ 8 characters
- ☐ 1 letter
- ☐ 1 number

\* New Password

\* Confirm New Password

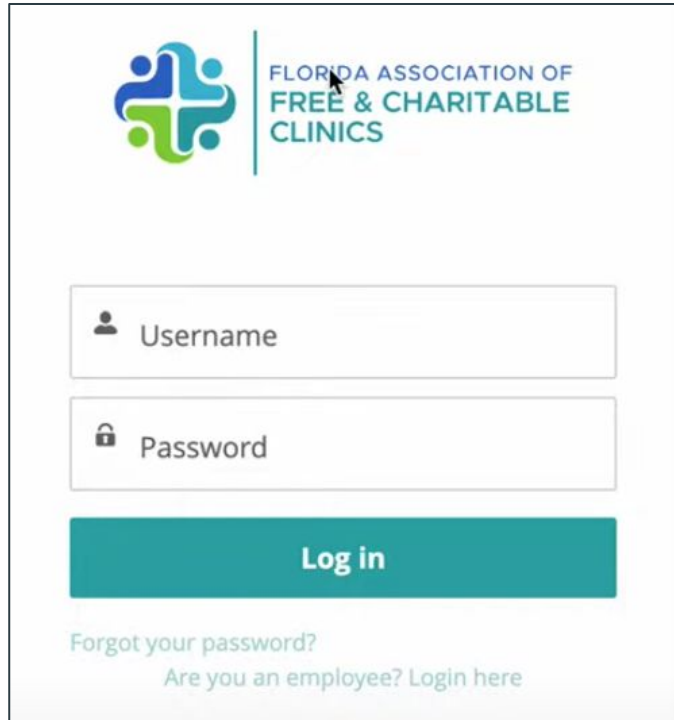
Change Password

Password was last changed on 7/5/2023, 1:58 PM.

1. Enter a new password that meets the specified requirements.
2. Confirm your new password.
3. Click on the "Change Password" button.

# Salesforce: Account Setup

You will be automatically redirected to the FAFCC Member Portal home screen.



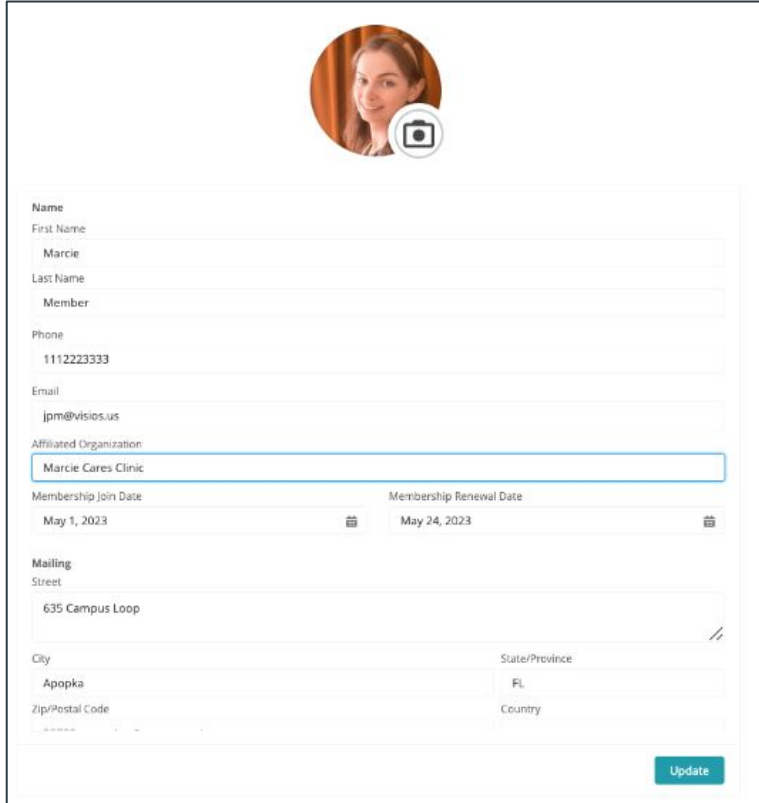
The screenshot shows the login interface for the Florida Association of Free & Charitable Clinics (FAFCC). At the top left is the FAFCC logo, which consists of three stylized human figures in blue and green. To the right of the logo is the text "FLORIDA ASSOCIATION OF FREE & CHARITABLE CLINICS". Below the logo and text are two input fields: the first is labeled "Username" with a person icon, and the second is labeled "Password" with a lock icon. Below these fields is a teal "Log in" button. At the bottom of the form, there are two links: "Forgot your password?" and "Are you an employee? Login here".

1. Enter your email address as the username.
2. Use the password you created during the password change process.
3. Click on the "Log In" or "Sign In" button.
4. You will be logged in and redirected to the home screen.



# Salesforce: Account Setup

After logging in, you will land on the home screen, scroll down to view the available options and features.



The screenshot shows the Salesforce Account Setup form. At the top, there is a circular profile picture placeholder with a camera icon. Below it, the form fields are organized into sections: Name (First Name: Marcie, Last Name: Member), Phone (1112223333), Email (jpm@visios.us), Affiliated Organization (Marcie Cares Clinic), Membership Join Date (May 1, 2023) and Membership Renewal Date (May 24, 2023), Mailing (Street: 635 Campus Loop), City (Apopka), State/Province (FL), Zip/Postal Code, and Country. An 'Update' button is located at the bottom right of the form.

**Name**  
First Name: Marcie  
Last Name: Member

**Phone**  
1112223333

**Email**  
jpm@visios.us

**Affiliated Organization**  
Marcie Cares Clinic

**Membership Join Date**  
May 1, 2023

**Membership Renewal Date**  
May 24, 2023

**Mailing**  
Street: 635 Campus Loop

**City**  
Apopka

**State/Province**  
FL

**Zip/Postal Code**

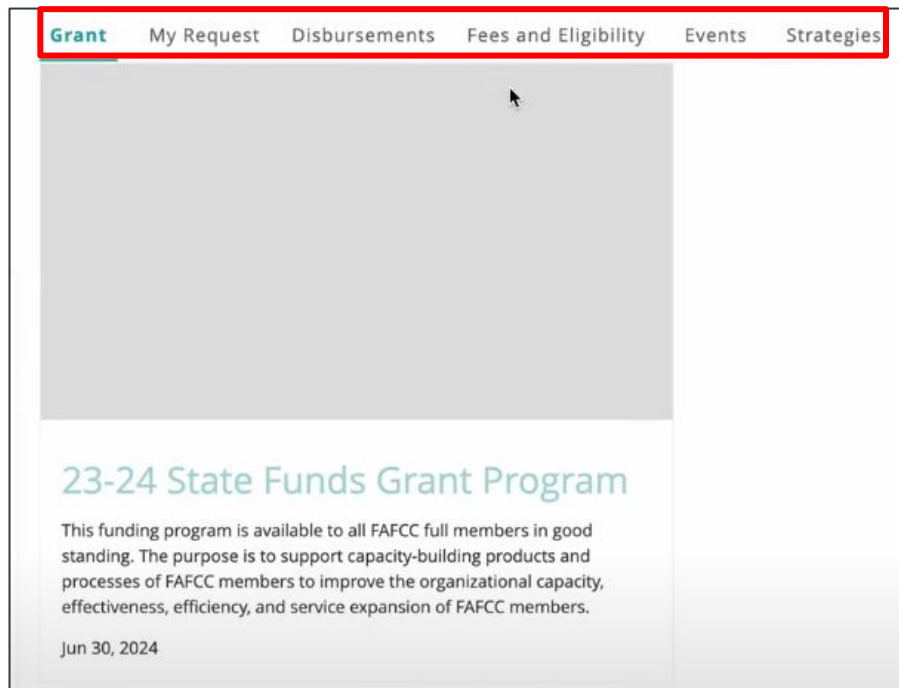
**Country**

**Update**

1. Add your profile picture (optional).
2. Update your contact information, including first name, last name, address and other organizational and contact information

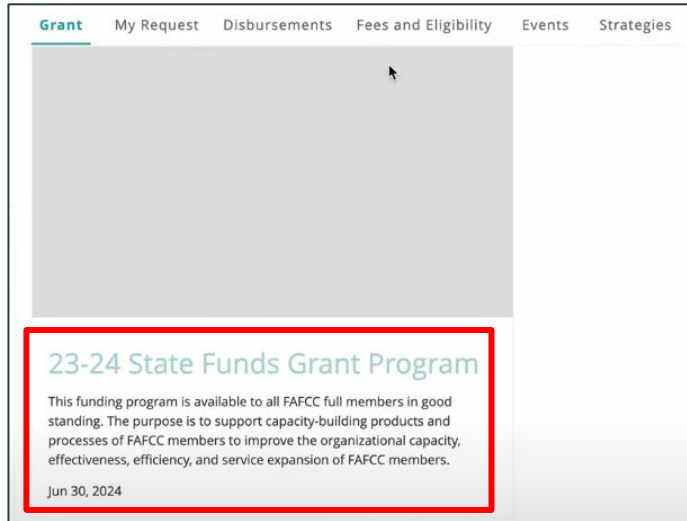
# Salesforce: Navigation

On the right side, you'll find menu items for managing grants, fees and eligibility, events, and assistance.



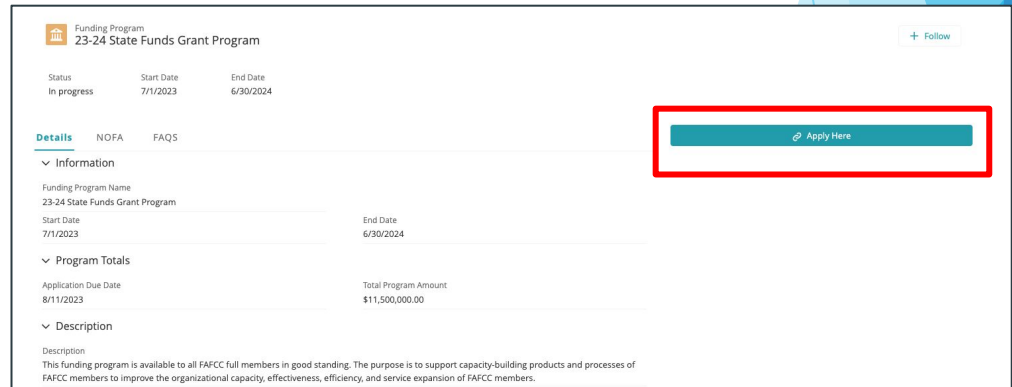
- **Grants:** Access various grants and view information on state funds, grant applications, disbursements, etc.
- **Fees and Eligibility:** Manage management fees and CMR (Community Managed Resources) fees.
- **Events:** Register for webinars and access event information.
- **Assistance:** Seek help through general questions, strategy calls, reallocations, or other grant-related matters.

# Salesforce: Applying for a Grant



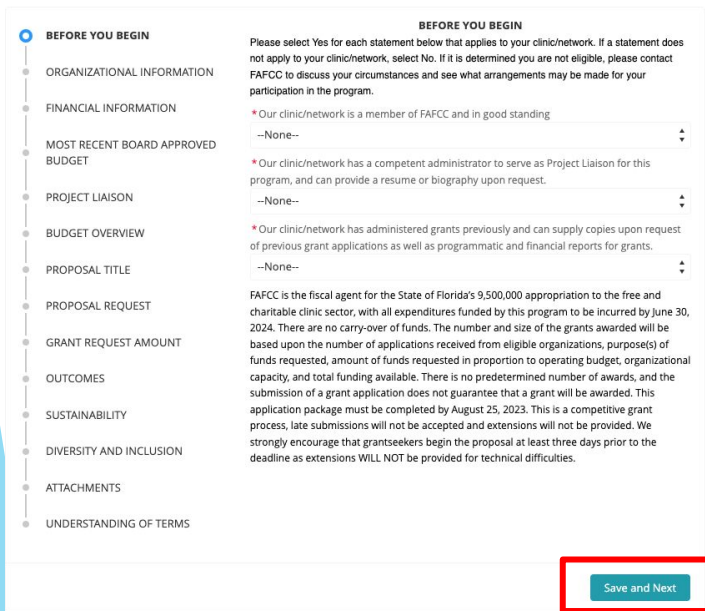
1. Click on the specific grant you wish to apply for.
2. If available, review additional information such as reporting periods, NOFA (Notice of Funding Availability), and FAQs.

3. Click the "Apply Here" button to access the application form.



# Salesforce: Saving Your Progress

Once in the application, the chevron to the left will indicate application progress, each section should be complete chronologically.



The screenshot displays the Salesforce application interface. On the left, a vertical progress bar shows the current section, 'BEFORE YOU BEGIN', highlighted with a blue circle. Below it, a list of sections is visible: ORGANIZATIONAL INFORMATION, FINANCIAL INFORMATION, MOST RECENT BOARD APPROVED BUDGET, PROJECT LIAISON, BUDGET OVERVIEW, PROPOSAL TITLE, PROPOSAL REQUEST, GRANT REQUEST AMOUNT, OUTCOMES, SUSTAINABILITY, DIVERSITY AND INCLUSION, ATTACHMENTS, and UNDERSTANDING OF TERMS. The main content area is titled 'BEFORE YOU BEGIN' and contains instructions: 'Please select Yes for each statement below that applies to your clinic/network. If a statement does not apply to your clinic/network, select No. If it is determined you are not eligible, please contact FAFCC to discuss your circumstances and see what arrangements may be made for your participation in the program.' Below this, there are three statements, each with a dropdown menu for 'Yes' or 'No':

- \* Our clinic/network is a member of FAFCC and in good standing. --None--
- \* Our clinic/network has a competent administrator to serve as Project Liaison for this program, and can provide a resume or biography upon request. --None--
- \* Our clinic/network has administered grants previously and can supply copies upon request of previous grant applications as well as programmatic and financial reports for grants. --None--

At the bottom right, a red box highlights a green button labeled 'Save and Next'.

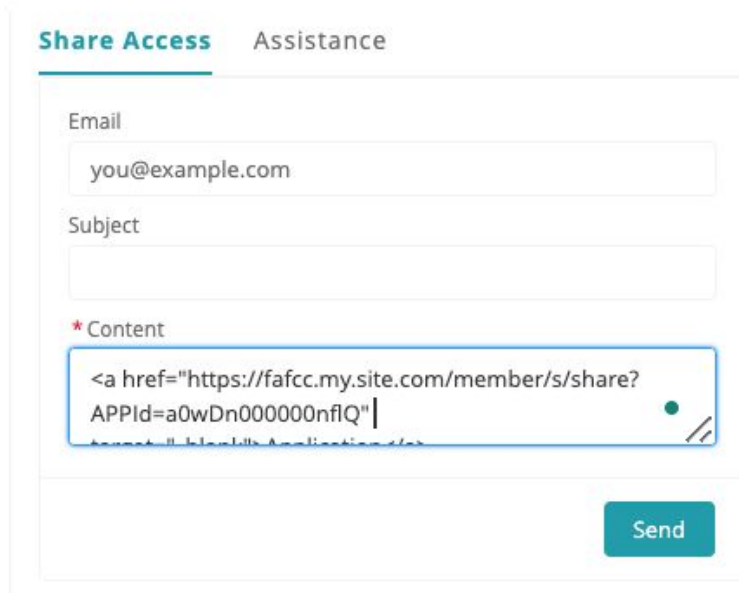
Grantees can navigate from section to section by clicking the “next” button at the bottom of the page

Also use the “save & next” button to save your content.

**Important:** this application does not autosave, always hit “save & next” to save your progress or all progress will be lost

# Salesforce: Sharing Your Progress

Easily share your progress with coworkers by using the “Share Access” feature.



The screenshot shows the 'Share Access' interface in Salesforce. It has two tabs: 'Share Access' (selected) and 'Assistance'. The form contains three input fields: 'Email' with the value 'you@example.com', 'Subject' (empty), and '\* Content' (containing a URL). A 'Send' button is at the bottom right.

Share Access Assistance

Email  
you@example.com

Subject

\* Content  
<a href="https://fafcc.my.site.com/member/s/share?APPIId=a0wDn000000nflQ"|

Send

1. Make sure to click “next” to save and then refresh your browser (this will ensure your latest progress is shared)
2. Provide your coworker’s email and click send.
3. The shareable link under “content” will be emailed

# Salesforce: Adding Attachments

To add attachments click on “upload,” a browser window will appear. Select the appropriate file.


**ATTACHMENTS AND ACKNOWLEDGEMENTS**

The required documents you need are:


1. Attachment 1 – 501c3 Letter
2. Attachment 2 – Most Recent Board Approved Operating Budget
3. Attachment 3 – Previous Fiscal year, Actual Operating Budget (actuals)
4. Attachment 4 – Audit, Review, Compilation, or Letter of Explanation

Attachments must be submitted to FAFCC by no later than 5 pm EST on August 12th, 2022. Please submit the application below. Upon submission, the WizeHive Account holder will receive an automated email confirming receipt of your application. If an email is not received, please check your spam inbox prior to contacting Marcie (marcie@fafcc.org) to confirm."


501c3 Letter

 Upload Files Or drop files


Most Recent Board Approved Operating Budget

 Upload Files Or drop files

Previous Fiscal year, Actual Operating Budget (actuals)

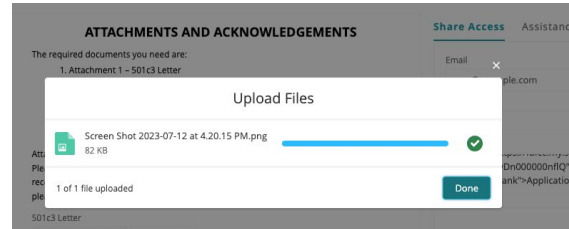
 Upload Files Or drop files

Audit, Review, Compilation, or Letter of Explanation

 Upload Files Or drop files

☐ Please confirm all attachments have been uploaded

Once uploaded, click “Done.”



The following should appear:

501c3 Letter

 Upload Files Or drop files

*501c3 letter successfully uploaded*

# Salesforce: Submitting Your Application

When ready, click “submit” in the acknowledgement section

**Signatures**

I, the Project Liaison, hereby certify that all of the information contained in this application, and the attached documentation, is true and accurate to the best of my knowledge. ⓘ

me

I, the Board Chair or Executive Director, hereby certify that all of the information contained in this application, and the attached documentation, is true and accurate to the best of my knowledge. ⓘ

me

Previous

Submit

# Salesforce: Submitting Your Application

The application can be edited once submitted until the deadline using this navigation bar

You have successfully submitted your 23-24 State Funds Grant Program request for review. To review any sections click below.


	Financial Information
	Organization Information
	MOST RECENT BOARD APPROVED BUDGET
	PROJECT LINKON
	BUDGET OVERVIEW
	PROPOSAL TITLE
	PROPOSAL REQUEST
	GRANT REQUEST AMOUNT
	OUTCOMES
	SUSTAINABILITY
	DIVERSITY AND INCLUSION
	ATTACHMENTS
	UNDERSTANDING OF TERMS



# Salesforce: Grant Application Navigation

**<https://www.fafcc.org/page/Grantintro>**

# WizeHive: Best Practices

- Salesforce is compatible with all internet browsers including:  

- While this platform is mobile friendly we **STRONGLY RECOMMEND** keeping to a workstation
- While grantees have the ability to save a draft when moving forward to next section, we always encourage backing up your report.
  - Copy and paste long answer descriptions in to field
  - Always be sure to click “save draft” prior to exiting
- Common troubleshooting steps for website issues are to clear your browser history and delete your browser cache and cookies.

# Important Deadlines

- ▶ Grant Scoring Webinar
  - Thursday, July 20th
- ▶ Application Deadline
  - Friday, August 18th



# Questions

