



INSTRUCTIONS FOR SUBMITTING AN APPLICATION ON THE CZI APPLICATION PORTAL

RFA: Effective School Practices to Support the Whole Child

Some helpful information as you get started:

- This document contains:
 - General guidance on using the portal
 - How to submit an application
- Please review the [website](#) for more information on the funding opportunity
- The Chan Zuckerberg Initiative uses SurveyMonkey Apply (SMAppl) as its application portal. All applications must be submitted through this portal (<https://apply.chanzuckerberg.com>). SMAppl is configured to work best using the Google Chrome browser. It is recommended that you familiarize yourself with this portal well in advance of any deadlines. Deadline extensions will not be granted.

GETTING STARTED

Account setup: The applicant (i.e., the person completing the application on behalf of the applicant organization) must first set up an account in the CZI online application portal at <https://apply.chanzuckerberg.com/>.

To set up an account:

1. Go to <https://apply.chanzuckerberg.com/>.
2. Click the green Register button in the upper right corner.
3. Complete the requested fields and then click the green Create Account button.
4. Click the green Continue button to proceed to the site.

Please note you will need to verify your account through the auto-email that you receive after registering. You will not be able to submit an application until your account is verified.

Personal Data: Where we ask for personal data about individuals in grant applications, please only submit data that you have a right to provide. We will use and store any data collected through the application process for grant-related purposes (e.g., administering the grant, decision-making related to grants, and analysis of our grant practices). The Chan Zuckerberg Initiative will be the “data controller” for any such personal information, and the data may be stored on servers outside of your home country, including within the United States. If you have any questions or concerns regarding our privacy practices or collection or use of personal data, you can contact us at privacy@chanzuckerberg.com

Navigating the portal: Once you have set up an account, you can log in to the application portal at <https://apply.chanzuckerberg.com/>. Using the links in the upper right corner, you can access available programs (which includes RFAs for all CZI focus areas, not just education) and any applications you have in progress or previously submitted. Use the information (“i”) link to get help with the portal. To access your account information, click your name in the upper right corner. Your application will pre-populate with the name and email listed in your account information; if you need to make any changes, click your name in the upper right corner to make any necessary changes.

Forgotten username or password: If you have forgotten your username or password, please navigate to the application portal at <https://apply.chanzuckerberg.com/> and click the Log In link located in the upper right corner. Click the “Forgot Your Password” link and then enter the email address associated with your SMAApply account. You will then receive an email with information to reset your password. Please note that your username is your email address.

Other questions: If you have other questions about using the portal, please use the information (“i”) link in the upper right corner of the page, where you will find a link to FAQs about using the portal, as well as links to submit specific help requests. If you have specific questions about the RFA, please contact us at wholechildrfa@chanzuckerberg.com

SUBMITTING AN APPLICATION

To submit an application:

1. Go to <https://apply.chanzuckerberg.com>
2. Log in.
3. Click the green View Programs button or the Programs link in the upper right corner. This will bring you to a listing of all programs/RFAs that CZI is hosting in SMAApply. You may need to scroll down to find the program/RFA you are looking for.
4. Find the program/RFA title “**Effective Practices to Support the Whole Child**” in and click the green More button.
5. Click the green Apply button in the upper right and complete all sections (details below).
 - a. You will be prompted to enter the title of your application, after which you will have access to the application tasks to complete. The proposal title is limited to 75 characters, including spaces. If you need to edit your proposal title, click the My Applications link in upper right and click the green Continue button on the application you wish to edit. Once the application page opens, click the three dots to the right of the application title (next to the Preview link) and select Rename from the dropdown menu.
 - b. The application is made up of several sections called tasks that are listed in the menu on the left side of the page. To open a task, click the one you would like to work on. You can edit and complete tasks in any order. You may need to scroll down to see the remaining tasks.
 - c. Once you complete a task, click the green Mark as Complete button within the task. All tasks must be marked as complete before submitting. To edit a task after marking as complete, click the three dots in the upper right of the task and select edit, which will re-open the task.
 - d. Your application will autosave every few seconds, but you can also click the Save & Continue Editing button for each task to save your application as you proceed.
 - e. For tasks that require a PDF upload: If you need to delete and replace a PDF after you have uploaded it, go to the Attach File section of the relevant task, click the three dots to the right of the file, and select Remove from the dropdown menu.
 - f. To download your application, click the three dots in the upper right corner of the application page and select download. If you are within a task, first click the Back to

