GO Smart Applicant Portal and Initial Application Set-Up Checklist

Applicant portal set-up: Complete this section before inviting applicants to your site.

☐	Home Message	*Front End Manager > Agency Editor*	Craft the message that will display to your applicants when they arrive at your domain. Your message can include imagery, links, and html formatting.
☐	Logo	*Front End Manager > Agency Editor > Branding*	Upload your logo here. PNG and Vectorized file types will alleviate the white border around the logo allowing the background color to extend to the edges of your logo.
☐	Edit Profile	*Front End Manager > Profile Editor*	Turn optional questions of the registration form on or off using the drop-down menus located to the right of each question.
☐	Media Library Module	*Front End Manager > Media Library Module*	Set the allowed media types and language for your applicants' online media library.
☐	Resource Pages	*Front End Manager > Navigation Editor*	Create additional web pages that will be available to your applicants. Examples of these types of pages are "Guidelines," "Best Practices," and "Resources."

Initial Program/Cycle set-up: Complete this section before inviting applicants to work on a grant opportunity.

☐	Program Name	*Grant Editor > Programs*	Create the name of the program as it will appear to your administrators from the drop-down menu. This should be a master heading such as "Operating Support," "Project Support," "Fellowship," etc.
☐	Cycle Editor	*Grant Editor > Program Cycles*	Complete the logistics for each cycle.
☐	Cycle Pages	*Grant Editor > Cycle Pages*	From here you can complete the pages of your Application, as well as optional Intent to Apply, Interim Report, and/or Final Report pages. You can create the content of your Interim/Final reports after your application is administered.
☐	Status Mailer	*Grant Editor > Status Mailer*	After creating the pages of your grant opportunity, be sure to create any desired auto-emails that will go out when an applicant meets a status (ie. Received upon submitting) or when the admin manually changes an applicant to a specific status.

Prepare your next grant opportunity

☐	Create New Cycle	*Grant Editor > Program Cycles*	After creating a cycle and its pages, you can clone that cycle to create the next cycle, rather than creating new cycles from scratch. Select the original cycle, scroll to the bottom of your Cycle Editor, and click Create New Cycle. The page will refresh and you will see a new cycle with the word EDIT appended to it.
☐	Modify New Cycle Logistics	*Grant Editor > Program Cycles*	From here you can modify the name, prefix, and other appropriate elements on the Program Cycle Editor to reflect the new cycle logistics.
☐	Review New Cycle Pages	*Grant Editor > Cycle Pages*	Review the Application Pages and modify any pages. Pay attention to language and fields that might have outdated dates or information.
☐	Review Copied Status Mailers	*Grant Editor > Status Mailer*	Review copied Status Mailers and modify, activate, or disable as needed
☐	Create New Program	*Grant Editor > Program Cycles*	After creating a program, cycle, and its pages, you can clone that program to create additional programs and an initial cycle that is similar, rather than creating a new program from scratch. Select the original cycle, scroll to the bottom of your Cycle Editor, and click Create New Cycle. The page will refresh and you will see a new cycle with the word EDIT appended to it and you will note the new program with the word _COPY appended to it. Modify as you did above.

NEA Reporters ONLY: Complete this section before inviting applicants to work on an application.

☐	Profile Editor	*Front End Manager > Profile Editor*	OPTIONAL: Set the UEI Information, FEIN, and/or DUNS fields questions to "Displayed and Required" to provide applicants with a field into which they can enter these optional FDR fields.
☐	NEA Template	*Front End Manager > Cycle Pages*	The questions listed in this page allow you to gather 24 of the 28 required data points that automatically appear in the NEA report. These data points include grant amount requested, estimated number of audience members, and estimated budgets. Use this page in your final report and optionally in your application and/or interim report.
☐	Activity Locations Template	*Front End Manager > Cycle Pages*	Include this page in the rinal report to gather the project location data required by NASAA and the NEA.
☐	Project Budget Template	*Front End Manager > Cycle Pages*	OPTIONAL: You can gather the required budget data simply by using the NEA Template, but you can also include this page in the final report to gather the line items and the budget totals required by NASAA and the NEA. If you use this page, totals from this page will populate into the NEA report. If you do not use this page, the budget fields of the NEA template will populate into the NEA report.
☐	NEA Widget on Grant Manager	*Grant Manager > Grant Manager Dashboard*	This tool will allow you to add NEA, SAA, and other grant amount shares to the NEA report and allows you to view and modify other budget numbers as needed.