

You will access the system via the [log on page](#). It's recommend that you bookmark this page in your internet browser for ease of access. If you have already created an account, you may enter your email and password and log right in. Otherwise you'll want to click on the **“Create New Account”** button. If at any time after creating an account, you can't remember your password, you may click on the Forgot Your Password button, enter your email address and you will be sent a link to reset your password.



## Logon Page

Email Address\*

Password\*

[Forgot your Password?](#)

Log On

Create New Account



**Welcome to the Texas Medical Association Foundation's online grant portal.**


**New Users:** Please click on "Create New Account" to complete the registration process and create your logon credentials.

**Existing Users:** Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password" link to the left to reset your password.

**Not Sure?** If you think that you or someone at your organization has already registered in the system, do not create a new account. Please contact our Grant Administrator, Sean Dunham, at [sean.dunham@texmed.org](mailto:sean.dunham@texmed.org) to receive your username and password.

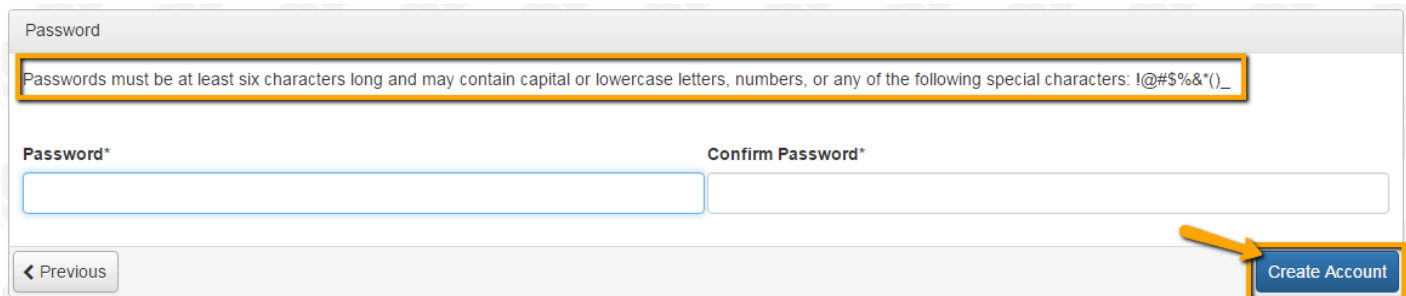
## CREATE NEW ACCOUNT

- Creating a new account is a multi-step process;
  - with the first section collecting **Organization Information**;
  - the second section collecting **User Information**. The user is the “applicant,” an organization may have more than one user for an account over time;
  - and sections three and four collecting **Executive Officer information**.
- After **Organization Information** has been entered click on the “Next” button.

Organization Information	
Organization Name*	EIN / Tax ID (##-#####)*
DUNS Number (#####)	Web Site*
Telephone Number (###-###-#### x###)*	Organization Email
Address 1	Address 2
City	State
Postal Code	Country
	
User Information	
Executive Officer Question	
Additional Executive Officer Information	
Password	

- The next section is **“User Information”** for YOUR information as an applicant.
  - If your address is the same as your organization you may use the **“Copy Address from Organization”** button to automatically pull the address information from the organization address fields in this section.
  - It is very important to note that the email address entered in the **email/username** field becomes the Applicant’s **Username** in the system.
- Once the fields on the **“User Information”** section are completed, click on the **“Next”** button.
  - Please note that should you need to navigate to previous sections of the registration process, you must use the **“Previous”** button at the bottom of each section in order for the information entered in registration fields to remain intact. Do not navigate to the previous section by using their browser's “back” button or you **will lose all registration information** entered.
- In the next section, indicate if you are the Organization’s Executive Officer.
  - If you are the executive officer select **“Yes.”** You will then be taken to a section of optional fields that include only the fields that were not required in the “User Information” section.
  - If you are not the executive officer select **“No”** and complete the Executive Officer’s fields with information on the Executive Officer for your organization.
- Once the executive officer’s information is entered, click on the **”Next”** button to create a password for the User’s Profile.

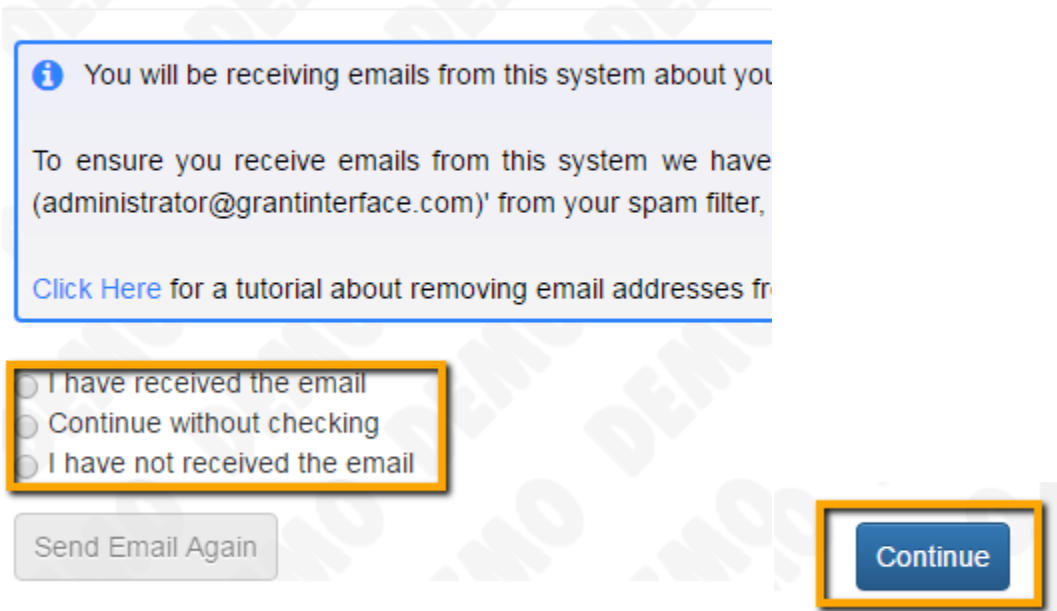
- Password requirements are listed at the top of the password section, so the User can create their password accordingly.
- Once the password is created, the User clicks the “**Create Account**” button.



## EMAIL CONFIRMATION

After clicking “Create Account” you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system. Follow the onscreen instructions and click the “Continue” button to finish the registration process. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.


### Email Confirmation



## APPLY PAGE

- Now you have an account in this system (this is an account that you will use for both current and future applications) you may begin an application.

Texas Medical Association Foundation John Fake ▾


[Home](#)
[Apply](#)
[Organization History](#)
[Fax to File](#)

## Apply

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Medical Student Community Leadership Grants Accepting Submissions from 06/01/2017 to 12/15/2017

Grants to County Medical Society and Alliances.

**Deadlines for consideration**

- Applications received by **August 15th** will be considered for grant funding on September 15, 2017.
- Applications by **December 15th** will be considered for grant funding on January 25, 2018.

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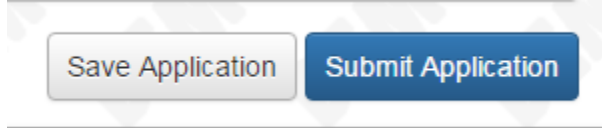
- You may preview the application without having to save any work by clicking on the “Preview” button. To start an application click on the blue “Apply” button under the opportunity you’d like to apply to.

## APPLICATION FORM

Once in the application, note that your user contact information and organization information automatically populates at the top of the form.

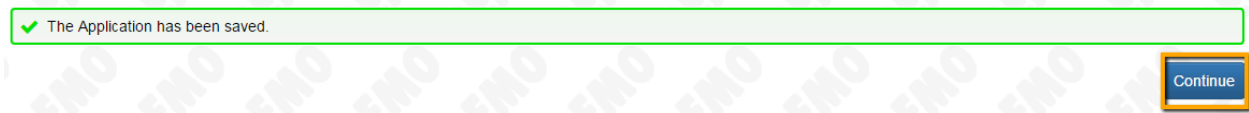
- Next, you will simply work your way through the form responding to the fields.
  - Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
- You may collapse question groups as you go, once you’ve finished all of the questions in that group, as an indicator to yourself that you’ve completed that section and reduce scrolling time.
- Some fields may have character limits.
  - Responses that are longer than the set limit will be saved, **but** an error message will appear informing the applicant the the limit has been exceeded.
    - You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.
- Even though the system is auto-saving there is still a “**Save**” button at the bottom of the form.

- When you click save you are taken to a confirmation page so you know the save was successful.
  - If you click “**Continue**” you will be taken back into the form so you can continue working.
  - If you save and exit the system, you will access the **draft of the form** from your **Dashboard** the next time you log in.
    - Pick back up where you left off by clicking “**Edit**” link to the right of the request.
- When all of the fields are complete, submit the application.



- If any required fields were not completed, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
  - An error message appears listing the fields that need to be completed or edited.
  - These fields are outlined in red so they are easy to identify as the applicant scrolls through the form.
- When a form is submitted successfully, the applicant will be taken to a confirmation page.
  - When the you click “**Continue**” you are taken to your dashboard where you can VIEW your submitted request.
  - Note, that once an application has been submitted you can no longer edit it.

### Confirmation Page




Please note, that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending “time out”).

### APPLICANT DASHBOARD

- After you’ve submitted or saved your application you can return to your applicant Dashboard by clicking on the “Home” icon link in the navigation menu.
  - On your Dashboard you can view requests that have been submitted,
  - Or you can edit applications that you have saved but have not submitted.

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## Applicant Dashboard

<b>Applicant:</b> Mr. John Fake JohnFake@invalid.email.com 555-55-5555 398 60th Street Bozeman, MT 59718	<b>Organization:</b> Example Org A 13-1635294 555-55-5556 398 60th Street Bozeman, MT 59718
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[Contact Email History](#)

ⓘ If your organization information does not appear correct, please click the edit (pencil) icon.

▼ Flight Lessons

**Process:** Example Process

Application	Draft	03/01/2017	<a href="#">Edit Application</a>
Decision	Undecided		

- If your request is approved the user will be assigned Follow Up Reports to be completed and submitted through the system.

## EDITING YOUR PROFILE

If you wish to edit your account information or change your password, click your name in the type right. This will expand a drop-down menu. If you click “Edit my Profile,” you will be able to update your user information or change your password. Be sure to click save in the bottom right once you’ve finished.



The image shows a user profile dropdown menu for 'Joe Thomas'. The menu is open, showing options: 'aSZDFzXGCFV', 'Edit My Profile', 'Edit Organization', and 'Sign Out'. Below the menu, there are two buttons: 'Change Password' and 'Save'. Two orange arrows point from the 'Change Password' button to the 'Save' button, indicating the next step in the process.