

## A guide to the HealthCarePlus Grants Portal

Before starting the application process we recommend that you read the following documents to familiarize yourselves with what the grants involve:

- HealthCarePlus Charitable Education Grants – Procedures and General Guidelines
- The Information pack for the Category of grant that you wish to apply for.

These documents set out all that is required for the application and show what documents need to be uploaded to the application form. The uploads vary depending on the category so please ensure you familiarize yourself with the correct details.

Applications submitted without all the necessary documentation attached will not be considered.

Please note that the Grants Portal is not optimized for mobile phones. It works best on desktops or laptops but also on tablets.

Each page of the application form can be saved before moving to the next. Please ensure that you do this to ensure you do not lose your work. If you save as you go and are unable to complete the application in one session you will be able to return to the partially completed application to submit at a later time.

### ACCESSING THE PORTAL FROM THE HEALTHCAREPLUS WEBSITE

The HealthCarePlus Grants for Good webpage [here](#) enable you to:

Login (or Register on) to the Grants Portal by clicking this button – top right of your screen

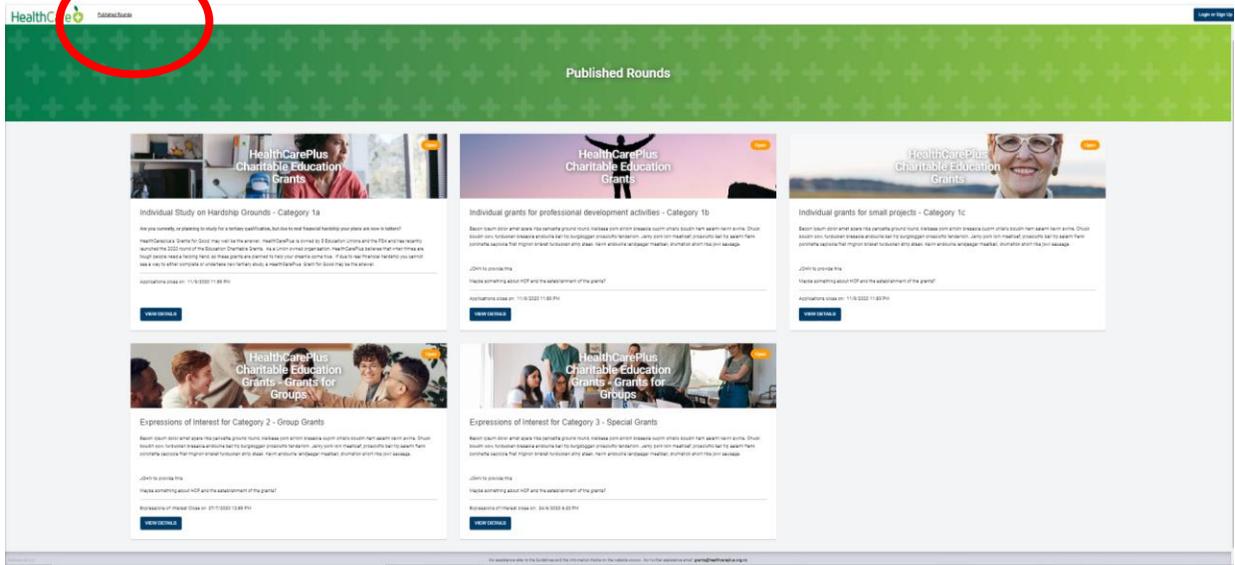
My Grant Login

From the same screen you can scroll down to see the five different of categories of grant with a description of each. To find out more or apply click the find out more and Apply button for the chosen category.

Find out more and Apply

## THE HEALTHCAREPLUS GRANTS PORTAL

Once on the Grants Portal you will see the grant you were interested in or by clicking the tab marked Published Rounds you will see all of the available grants. To be able to use the portal you will need to be a registered user and the instructions below will take you through the User registration process and give you an idea of how to move around the site.



## NEW USERS

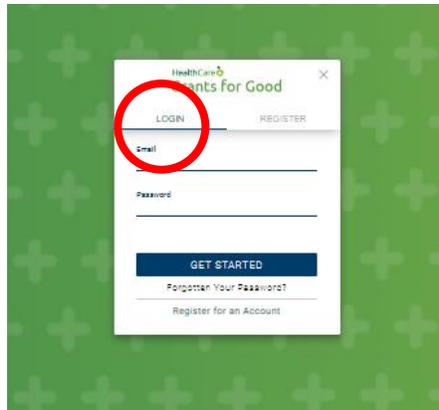
The HealthCarePlus Grants Portal is operated by “Enquire”. Before getting to the Grants Portal you need to be a registered user of Enquire so you will get some systems notifications directly from the Enquire Team.

## REGISTER AS A USER ON THE ENQUIRE SYSTEM

If you are not already Registered on the Enquire system you will be taken to the registration screen. If you are already registered you can login.

To register/sign up go to the button in the top right of your screen:





## CREATE YOUR PROFILE

If this is the first time you have logged in you will be led into the **User Profile** screens to complete your profile. This process is self explanatory.

## REGISTER YOUR INDIVIDUAL ACCOUNT

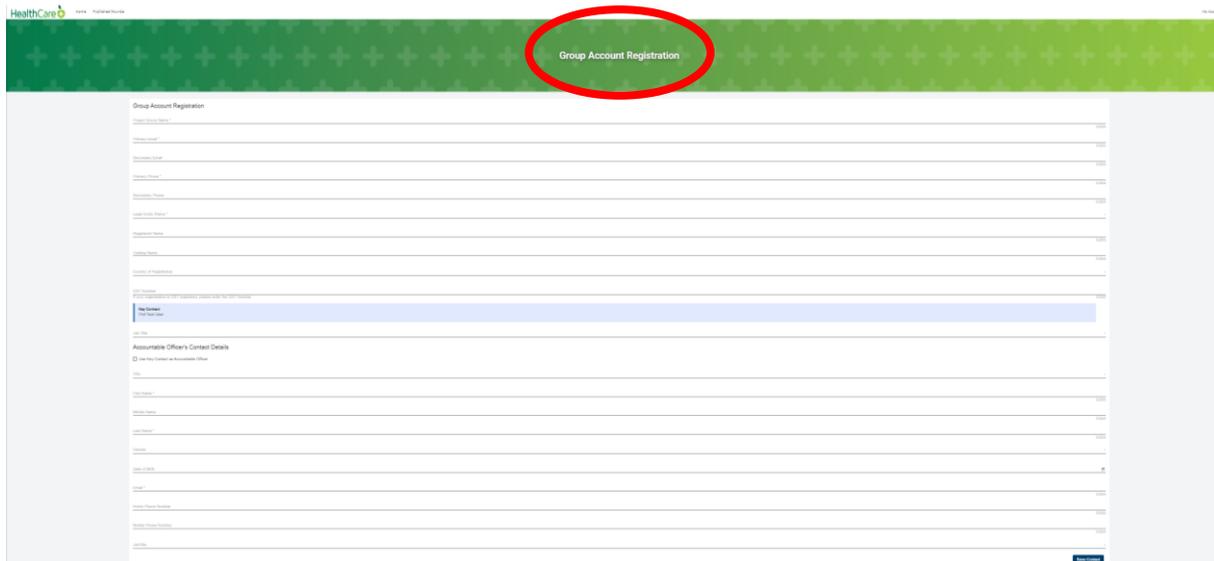
That done you will be taken to the Account Type Screen where **all new users** will need to register an **Individual Account**. You only need to register your Individual Account once.

This is a simple process and only takes a few minutes.

If you are applying for a grant under Category 1 – Individual Grants you are now ready to go. If you are applying on behalf of a group Category 2 or 3 Grants, you will first need to create a group account – see below. That is easy by completing a group registration form and asked to register a new account.

## REGISTER YOUR GROUP ACCOUNT

If you are applying on behalf of a Group under the Category 2 and Category 3 Grants you will then need to create a group account. If you are applying for an Individual Grant you do not need to do these steps, go straight to the “Your home screen” section.



The screenshot shows the HealthCare+ Grants for Good website interface. At the top, there is a green navigation bar with the text "Group Account Registration" circled in red. Below this, the main content area displays a form titled "Group Account Registration". The form is divided into several sections, including "Group Account Registration" and "Accountable Officer's Contact Details". The "Group Account Registration" section contains various input fields for details such as "Organisation Name", "Organisation Type", "Organisation Address", "Organisation Phone", "Organisation Email", "Organisation Website", "Organisation Logo", "Organisation Description", "Organisation Sector", "Organisation Size", "Organisation Status", "Organisation Registration Number", "Organisation Registration Date", "Organisation Registration Country", "Organisation Registration State", "Organisation Registration City", "Organisation Registration Postcode", "Organisation Registration Country Code", "Organisation Registration State Code", "Organisation Registration City Code", "Organisation Registration Postcode Code", "Organisation Registration Country Code", "Organisation Registration State Code", "Organisation Registration City Code", "Organisation Registration Postcode Code". The "Accountable Officer's Contact Details" section contains input fields for "Accountable Officer's Name", "Accountable Officer's Title", "Accountable Officer's Email", "Accountable Officer's Phone", "Accountable Officer's Address", "Accountable Officer's City", "Accountable Officer's State", "Accountable Officer's Postcode", "Accountable Officer's Country", "Accountable Officer's Country Code", "Accountable Officer's State Code", "Accountable Officer's City Code", "Accountable Officer's Postcode Code". There is a "Use Key Contact as Accountable Officer" checkbox in the "Accountable Officer's Contact Details" section. The form is set against a light blue background with a pattern of small green stars.

This screen will carry forward some of the details already provided from your Individual Profile but will also request some information about the group/organisation.

**NOTE: The Grants are only open to New Zealand domiciled organisations or overseas organisations where the Accountable Officer is a New Zealand Citizen or resident. You will need to provide proof of this as part of the application process.**

### *Accountable Officer*

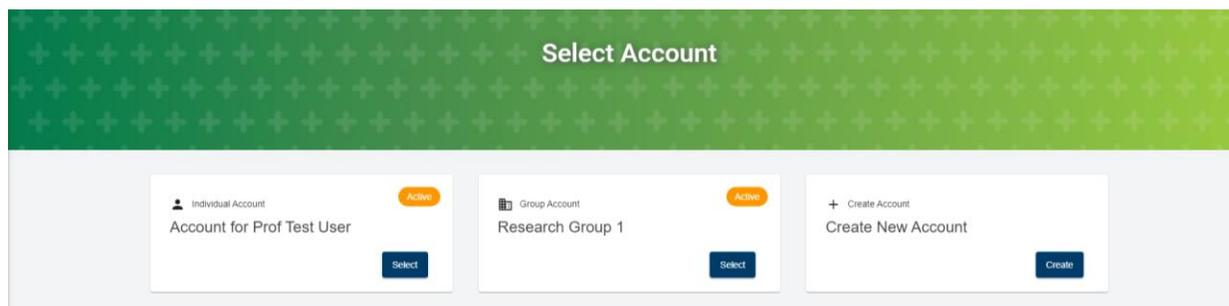
The process assumes that the person completing the application on behalf of the group will be the contact person for the team. There is an option for this person to also be the Accountable Officer – *the person that has authority to sign the contract on behalf of the group*. If the contact person and Accountable Officer are the same person please check the box asking the question **Use Key Contact as Accountable Officer**.

If a different person has the authority to sign the contract please leave the box unchecked and enter their details into the lower part of the form.

Always save the forms each time you make a change. You will not be able to proceed unless all the mandatory fields have been completed.

## SELECT YOUR ACCOUNT

Once the form has been saved and completed you will be led to your **“Select Account”** screen. From here you choose the account you wish to use to apply for your Grant.

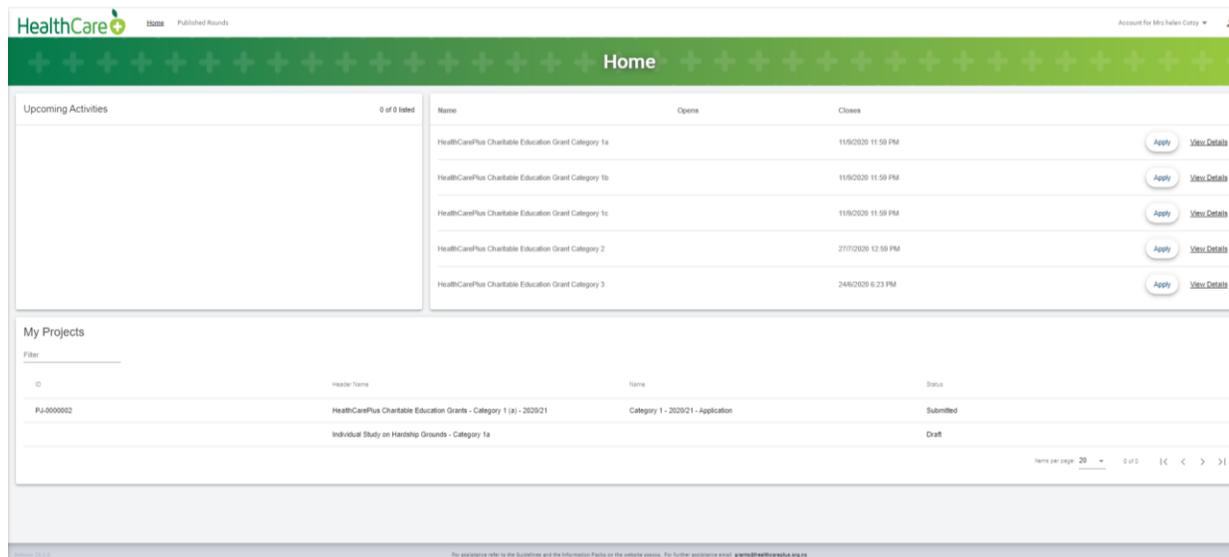


**FOR CATEGORIES 1A, 1B AND 1C GRANTS SELECT THE INDIVIDUAL ACCOUNT OPTION.**

**FOR CATEGORIES 2 AND 3 SELECT THE GROUP ACCOUNT OPTION.** If you are applying on behalf of two different groups you would need to create another group using the **“Create New Account”** Option.

## YOUR HOME SCREEN

Once your selection has been made you will be taken to your **“Home”** screen where you will see details of all the open (active) grants any **Upcoming Activities** you may have and applications/projects you have submitted under that User (i.e. the Individual or the Group) registration.



From your **Home Screen** you can view or apply for any of the Categories.

WHILE ALL OPTIONS ARE AVAILABLE TO YOU PLEASE ENSURE THAT AS AN INDIVIDUAL YOU ONLY APPLY FOR ANY OF THE CATEGORY 1 INDIVIDUAL GRANTS, AND AS A GROUP YOU ONLY APPLY FOR ANY OF THE GROUP GRANTS CATEGORIES 2 AND 3.

If you have previously started an application and saved along the way but not submitted the form you are able to continue the application from the entry in the “My Projects” section of your home page.

## APPLYING FOR YOUR GRANT

You are now ready to **Apply** for your grant.

You can do so either from the Home page or from the selection shown on the Published Rounds page simply by hitting the **Apply** button for the appropriate category.

The application process is straightforward and the Information Pack for the Category of grant you are applying for will give you further details on what is required.

## NAVIGATING THROUGH THE SCREENS

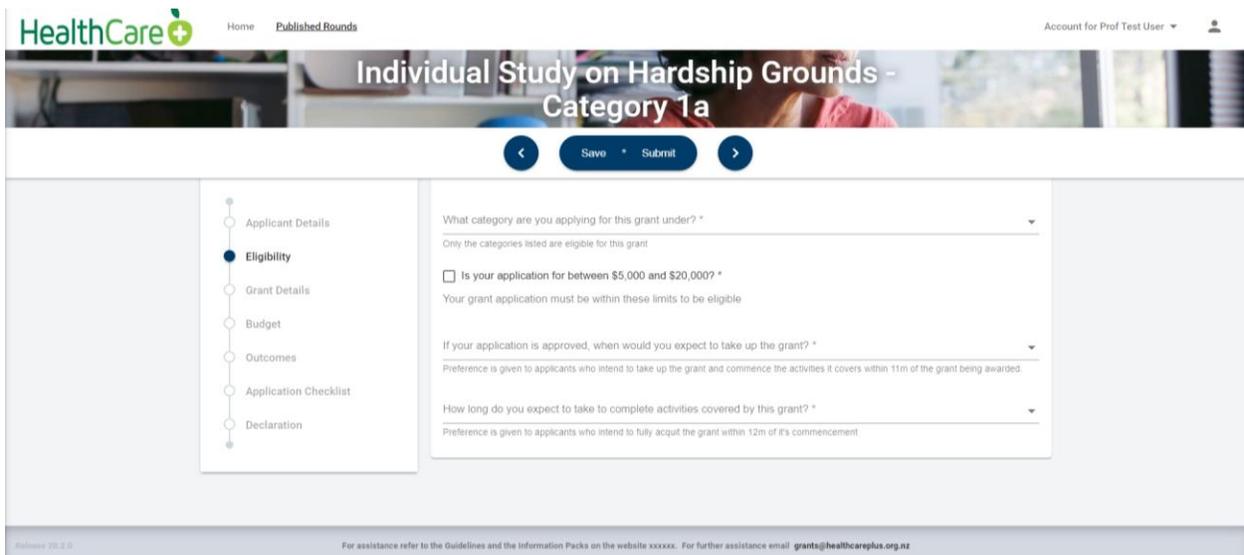
The Application form screens look similar to the one below with a form stepper on the left which will take you sequentially through the process.

The screens are self-explanatory and the Information Pack will help you to answer the questions and show you what the Grants Committee will be looking for.

Each page of the application form can be saved before moving to the next. Please ensure that you do this to ensure you do not lose your work. If you save as you go and are unable to complete the application in one session you will be able to return to the partially completed application to submit at a later time. To move through the steps either use the > and < buttons or select the step from the form stepper.

All mandatory fields must be completed and you will not be able to save the page unless you complete those fields. The save button is at the top of the form.

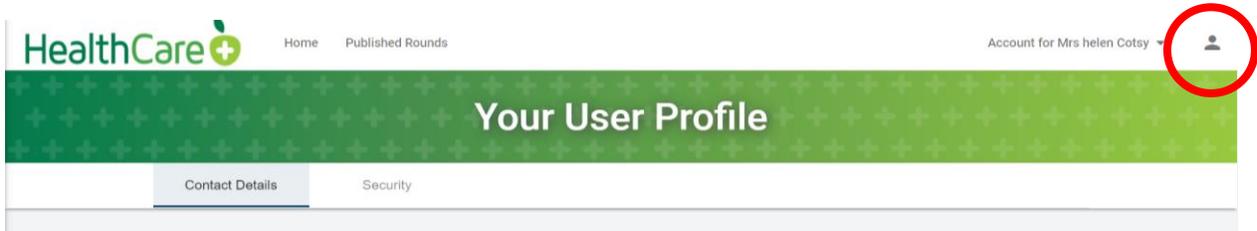
Once all steps are complete and you have worked through the checklist, attached the documents required and completed the declaration section you can submit your form. Once the form has been submitted you cannot make any changes.



## EDITING YOUR USER PROFILE

In the top right of your screen you will see your profile and account details buttons:

To edit your profile or to change your password you should use this button.



Select **User Profile** and then **Security** to **change password** and follow the prompts

To edit your user profile select **Contact Details**

## SWITCHING ACCOUNT

If you have both an Individual Account and a Group Account you can swap between the two with the account button (top right of the screen)



## GETTING HELP.

### Grants and the process

For questions about the Grants and the Grants process please refer to the Guidelines and Procedures and the Information Pack for the Category of Grant you are applying for. They can be found in the same space as this document was found. If these documents do not answer your questions please email [grants@healthcareplus.org.nz](mailto:grants@healthcareplus.org.nz). Please be aware that your response, depending on demand, may not be immediate so please do not leave questions until the last minute.

### Generic software support for the “enquire” portal

Please refer to the enquire support solutions document:

<http://support.enquire.cloud/support/solutions>. This document provides generic support for using the software.

### Technical support for the “enquire” portal

Please email [grants@healthcareplus.org.nz](mailto:grants@healthcareplus.org.nz). Please be aware that your response, depending on demand, may not be immediate so please do not leave questions until the last minute.