

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 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.

If you have already registered for the Grants Portal site you can go direct to the login screen by hitting the **My Grant Logon** button on the top right of the Grants for Good Page on the HealthCarePlus website.

NEW USERS

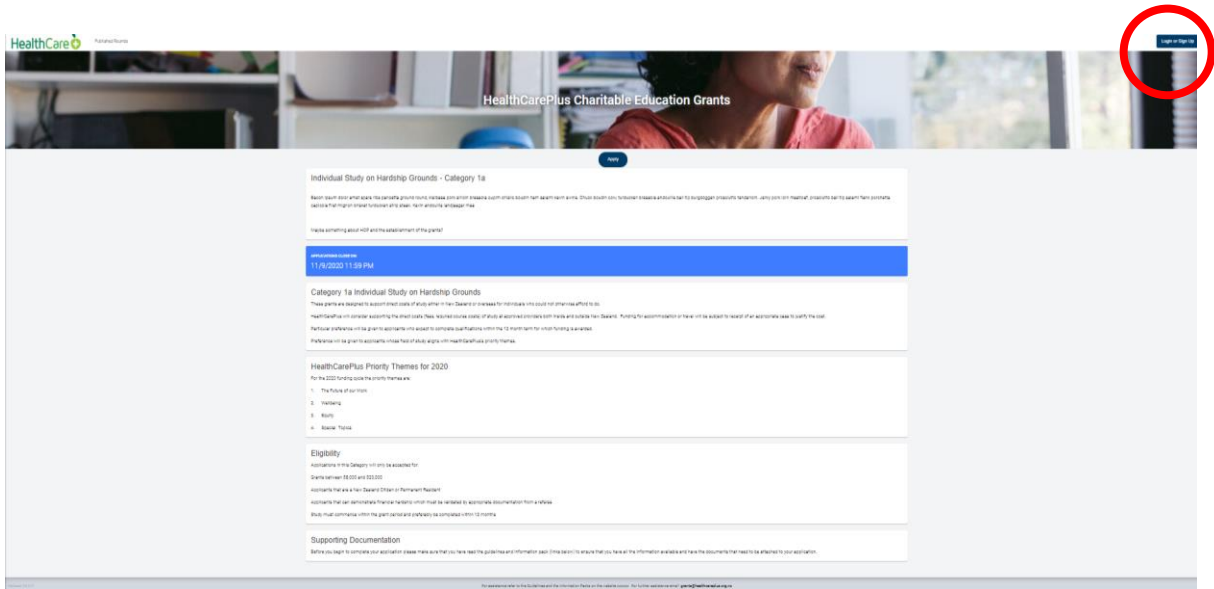
The HealthCarePlus Grants Portal is operated by “Enquire”. Before getting to the Grants Portal you need to be a registered user of Enquire so you will get some systems notifications directly from the Enquire Team.

REGISTER AS A USER ON THE ENQUIRE SYSTEM

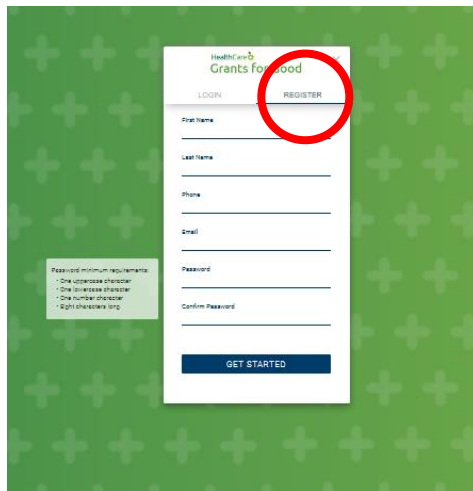
If you are not already Registered on the Enquire system you will be taken to the registration screen. If you are already registered you can login.

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





The registration process is straightforward and only takes a minute:

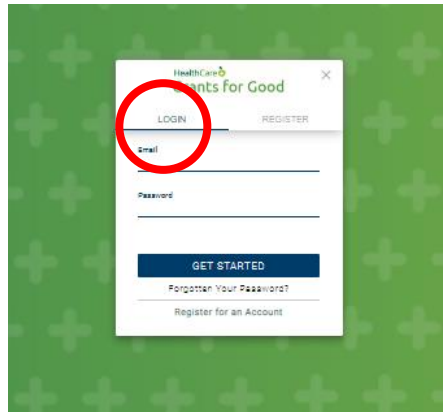


After you hit “Get Started” you will receive a verification email on which you will need to select **Verify your email address.**

Once you have done that a new message will appear confirming your **USER registration.**

LOGIN

You can now **login:**



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**.

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. Group registration form and asked to register a new account.

REGISTER YOUR 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.)

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. Category 2 and Category 3 Applications submitted under an Individual account will not be accepted.

The screenshot shows a web form titled 'Group Account Registration' on a green header. The form is divided into several sections with input fields. The top section is titled 'Group Account Registration' and contains fields for 'Organisation Name', 'Organisation Type', 'Organisation Address', 'Organisation Phone', 'Organisation Email', 'Organisation Website', 'Organisation Fax', 'Organisation GST Number', 'Organisation NZBN', 'Organisation Inland Revenue Number', 'Organisation Mailing Address', 'Organisation Mailing Phone', 'Organisation Mailing Email', 'Organisation Mailing Website', 'Organisation Mailing Fax', 'Organisation Mailing GST Number', 'Organisation Mailing NZBN', and 'Organisation Mailing Inland Revenue Number'. Below this is a section for 'Use Key Contact as Accountable Officer' with a checkbox. The bottom section is titled 'Accountable Officer's Contact Details' and contains fields for 'Name', 'Title', 'Address', 'Phone', 'Email', 'Website', 'Fax', 'GST Number', 'NZBN', 'Inland Revenue Number', 'Mailing Address', 'Mailing Phone', 'Mailing Email', 'Mailing Website', 'Mailing Fax', 'Mailing GST Number', 'Mailing NZBN', and 'Mailing Inland Revenue Number'. A 'Save' button is located at the bottom right of the form.

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**.

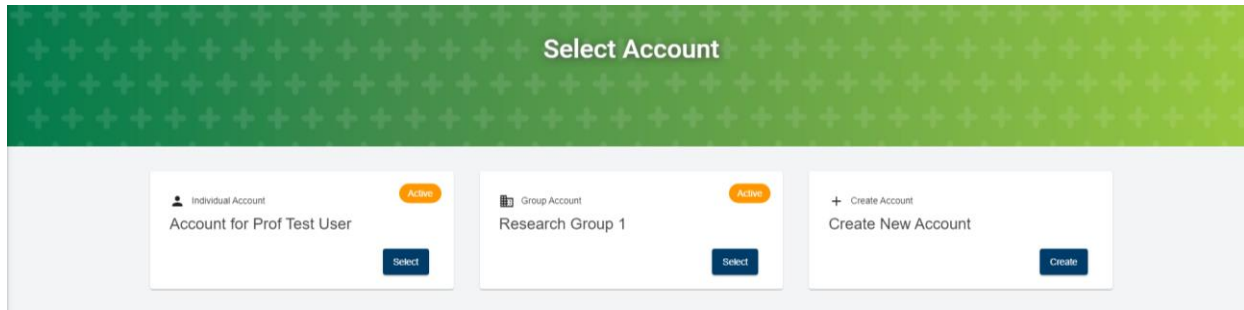
If a different person has the authority to sign the contract please leave the box unchecked and enter their details into the lower part of the form.

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.

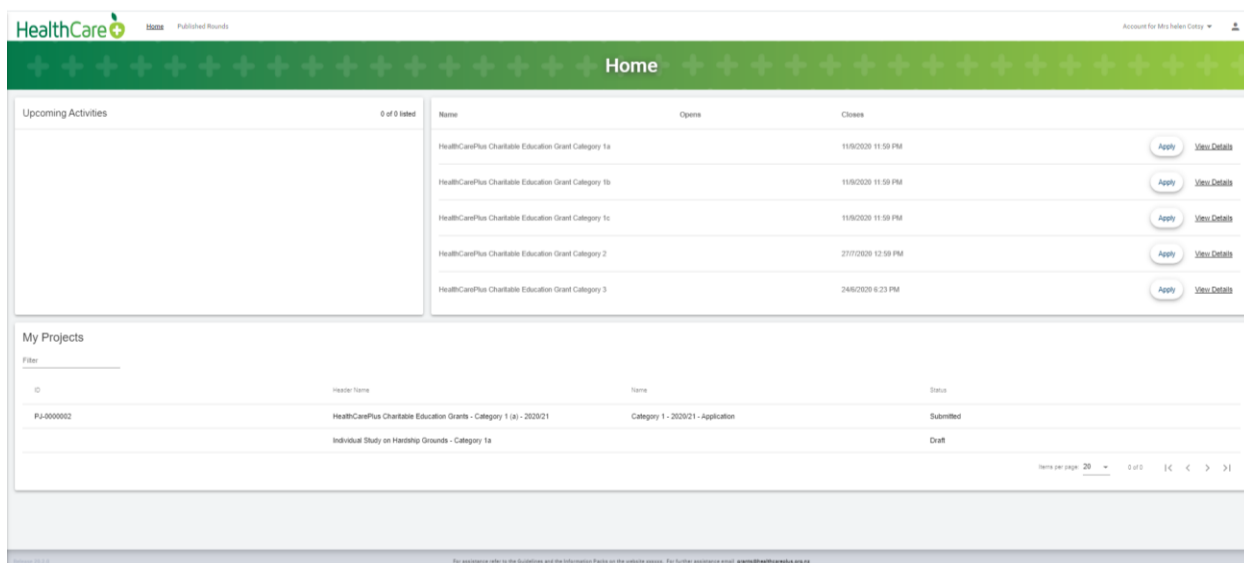


For Categories 1a, 1b and 1c grants select the Individual Account Option.

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 download the application form to check it before you submit.

On the final screen you will see the download button in the top right. Clicking this will give you the option to download the application. Once you are happy with your application you can then SUBMIT.

On the top right corner of the application, click the download icon (purple rectangle):

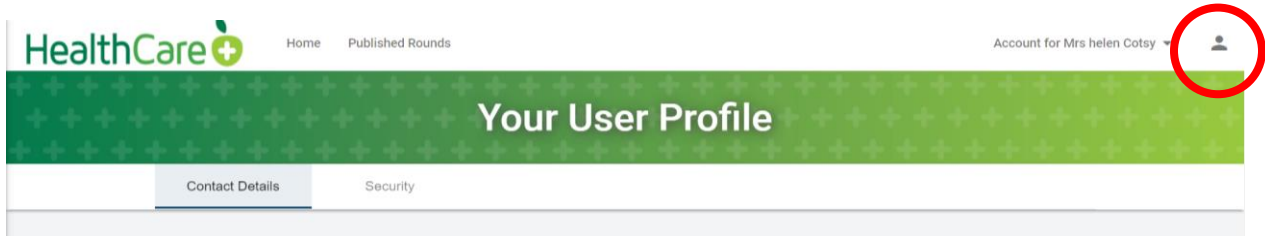


Once the application has been submitted you cannot make any changes so be sure to check your work before you do so.

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)



For technical support from the Enquire Team please