



Welcome to Simplify

This document contains a summary of the Simplify feature available for GIFTS Alta with the Internet Grants Application Manager.

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Technical Support

Need Help or Have Questions?

If you have questions or need assistance in any way, please contact MicroEdge Technical Support in any of the following ways:

Phone: 877.704.3343

Email: helpdesk@microedge.com

Online: Login to PowerME at www.microedge.com. Click the Case tab at the top of the homepage and click 'Create New Case' (Support Hours: M-F, 8:00 am – 8:00 pm ET)

Overview

What is Simplify?

Project Simplify grew out of recommendations from the Grants Managers Network's Project Streamline, which found that grant seekers wrestle with application and reporting practices that often are disproportionately burdensome. The main finding was that applicants fill out numerous applications for funding requests and have to re-key the same commonly asked fields in each application, often taking the applicant organization endless amounts of time.

Most applications include the same core elements, such as organizational data, contact information, a board of directors list, financial statements, and so on. Project Simplify is a *Data-sharing* and *Standards-setting* process that helps funders more easily access this frequently used information from grantees. *Standards-setting* creates a consistent format for core organizational information. *Data-sharing* happens through the GuideStar Exchange database, which already connects nonprofits with current and potential supporters. Nonprofits enter their core information once, and then it is automatically added to every grant application they complete for any participating funder.

The service is provided at no cost to the nonprofits (grant applicant / grant recipient), however all funders must pay an annual fee to GuideStar for *GuideStar for Grant Applications* service in order to access GuideStar Exchange data.

Introducing the ability to pull GuideStar Nonprofit Profile data into applications through Simplify provides funders with the ability to allow their applicants to auto-populate application forms.

For more information on the Simplify initiative, go to <http://www.simplifynow.org/>.

How does Simplify work?

Applicants often apply for funding from multiple organizations. When they are filling out online applications they often have to re-enter standard information such as Name, Address, City, State, Tax ID, Contact information over and over again for each unique application they are filling out.

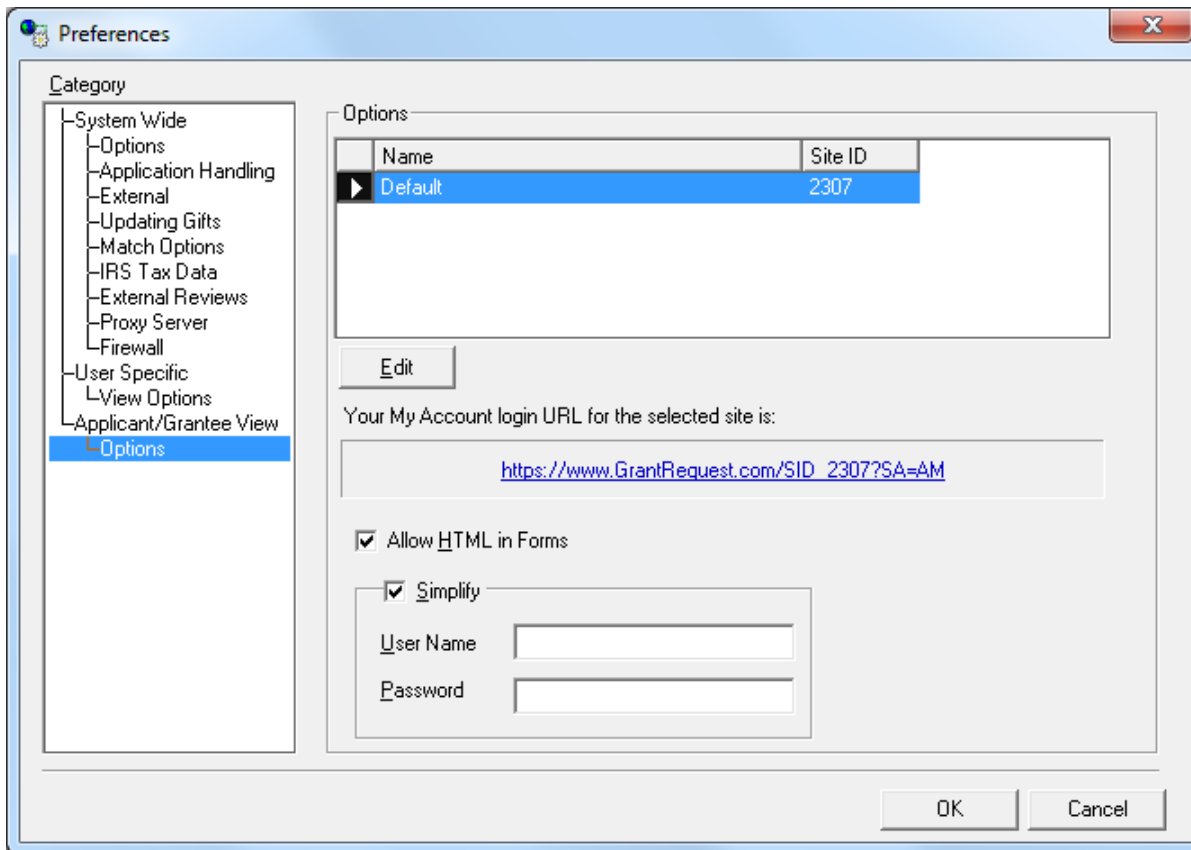
All nonprofits now can fill out a standard organizational GuideStar Nonprofit Profile on GuideStar's Exchange database for the Simplify initiative.

For online applications that have Simplify enabled, the applicant will be able to pull in their GuideStar Nonprofit Profile information and automatically fill in the matching fields on the application.

How do I enable Simplify for my site?

GIFTS Alta: If you are a *GIFTS Alta* client, please do the following:

1. Open the Grant Application Manager and select **Tools > Preferences**.
2. On the Category list to the left, click **Options** under Applicant/Grantee View.
3. Make sure the **Simplify** checkbox is checked and fill in your Username and Password for GuideStar Data Exchange.
4. Click **OK**.



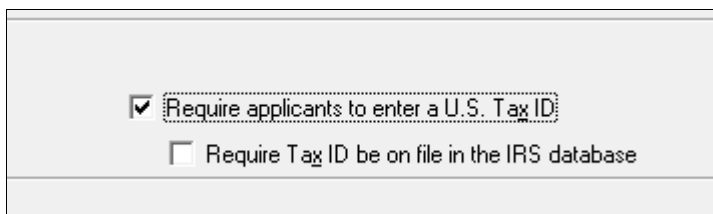
How do I enable Simplify for my online application forms?

Simplify relies on the Tax ID being entered on the application form.

This requires the 'Require applicants to enter U.S. Tax ID' option to be checked.

In the Grant Application Manager, open the application form setup and go to the **Properties** tab.

If this option is not checked, a Tax ID request will not be displayed to the applicant.



The entry of the applicant's Tax ID will, in turn, enable Simplify to pull data from the GuideStar Data Exchange.

NOTE: Application forms must be activated before Simplify will function.

How does this change how online applications work?

With Simplify turned on, applicants will be given the option to identify their organization with an EIN number when filling out an application form and have up to date information from the GuideStar Exchange Database auto-populate corresponding fields in the form.

This will not only save time for applicants, but will also ensure that the data is accurate.

How will it look to an applicant?

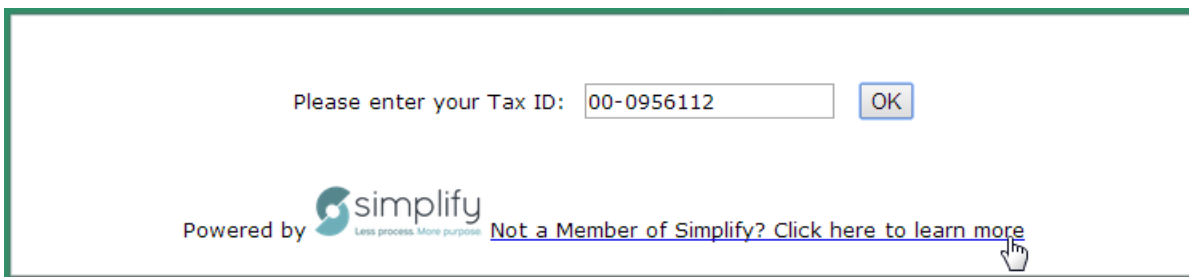
With Simplify turned on, applicants will be prompted to enter their Organization's Tax ID before the application form is opened. This prompt is identical to the window that comes up for an application form when Requiring Tax ID, except with a few extra items to accommodate Simplify.

NOTE: This prompt will not occur for Stage 2 application forms.

Keep in mind that not all applicants that arrive at this application will be Simplify members, and therefore will not have any Exchange Data saved with GuideStar. For this reason, there are multiple options when arriving at this window to accommodate different types of users/applicants.

Simplify Logo and Link

With Simplify on, below the Tax ID field will be the Simplify logo and a link to a site where applicants can learn more about Simplify.

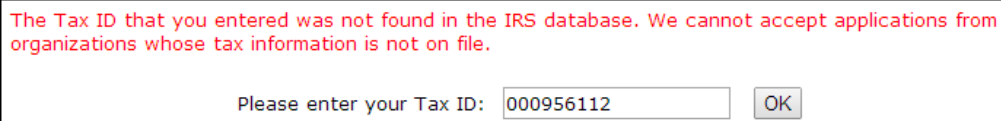


The screenshot shows a web form with the text "Please enter your Tax ID:" followed by a text input field containing "00-0956112" and an "OK" button. Below the input field is the Simplify logo, which includes the text "Powered by" and "Less process. More purpose." To the right of the logo is a blue hyperlink that reads "Not a Member of Simplify? Click here to learn more". A mouse cursor is pointing at the end of the link.

NOTE: The 'Powered by' text before the Simplify logo will initially also be supported in French and Spanish.

Procedure and Validation Rules:

- The applicant cannot skip the step to enter a Tax ID before beginning the application form.
- If the "Require Tax ID to be on file in the IRS database" option is also checked, this check will occur before the Simplify request gets sent (to make sure that the Tax ID is on the IRS database).
 - If the Tax ID entered is not on the IRS database, an error message will appear.



The screenshot shows a red error message box with the text: "The Tax ID that you entered was not found in the IRS database. We cannot accept applications from organizations whose tax information is not on file." Below the error message is the same Tax ID entry prompt as in the previous screenshot, with the input field containing "000956112" and an "OK" button.

- If the Tax ID entered is on the IRS database, the system will proceed to check if the Tax ID is on the GuideStar Exchange database.
 - If the Tax ID is valid, the applicant will be taken to the Eligibility Quiz, if it exists.
 - If there is no Eligibility Quiz, the applicant will be taken directly to the application form where data from the GuideStar Exchange and IRS BMF will have been filled in.
- If the "Require Tax ID to be on file in the IRS database" option is not checked, and the Tax ID entered is on the IRS BMF or GuideStar Exchange database, the system will continue to the eligibility quiz (if

required), or go straight to the application form and pull in the pertinent exchange data as well as IRS BMF data IF available.

- If the Tax ID is not found, an error message will appear.
- Clicking **OK** without modifying the Tax ID will take the applicant to the quiz or application form. The fields on the application will need to be entered manually.
- Clicking **OK** after changing the Tax ID will cause the system to recheck the Tax ID.
- Simplify data will take precedence over data found in the IRS BMF.
- A simplify logo will be displayed at the top left of an application form that has been successfully populated with exchange data.
- If a field being filled with exchange data is on the application more than once, fill all like fields with the same data.
- Simplify fields must be present on the application form to be populated, but may be hidden.
- Any fields filled in by Simplify can be overwritten by the applicant if needed.

1 Organization Info 2 Request 3 Finances 4 Attachments 5 Review My Application

Organization Info Printer Friendly Version | E-mail Draft

Powered by Simplify
* Required before final submission

Organization Primary Contact

Organization Name
All Stars Project, Inc.

Also Known As
All Stars

City
New York

Country
<None>

E-mail Address
projects@allstars.org

Address
543 West 42nd St

Phone

State
NY

How do GuideStar Exchange fields match up with GIFTS Alta fields?

The following tables list the fields available through GuideStar Exchange, along with their matching field in the GIFTS Alta database.

NOTE: Fields listed in Purple do not exist in the standard GIFTS Alta database. Clients will have to create custom fields using the GIFTS Customizer or Blueprint module with the specifications included in order to match the fields in the Simplify database.

Organization Fields

GuideStar Field	Field in GIFTS Alta/Online Database
EIN	Tax ID
Organization Name	Name
Also Known As (AKA)	a.k.a.
Doing Business As (DBA) name	Record Type: Organization Field Name: Doing_Business_As Standard Label: Doing Business As Type: Text Maximum: 50
Formerly Known As (FKA) name	Record Type: Organization Field Name: Formerly_Known_As Standard Label: Formerly Known As Type: Text Maximum: Long Text
Government Registered Name	Legal Name
Government Issued Ruling Year (The year the recognizing government registered this organization as a nonprofit.)	Record Type: Organization Field Name: Government_issued_ruling_year Standard Label: Government Issued Ruling Year Type: Long Number, No Decimal
Reason for Nonprivate Foundation Status	Record Type: Organization Field Name: Reason_for_Nonprivate_Foundation_Status Standard Label: Reason for Nonprivate Foundation Status Type: Long Text
Incorporation year	Record Type: Organization Field Name: Incorporation_Year Standard Label: Incorporation Year Type: Long Number, No Decimal
Mission Statement	Record Type: Organization Field Name: Mission_Statement Standard Label: Mission Statement Type: Long Text
Geographic Areas Served Narrative	Record Type: Organization Field Name: geographic_areas_served_narrative Standard Label: geographic areas served narrative Type: Long Text

GuideStar Field	Field in GIFTS Alta/Online Database
Impact Statement	Record Type: Organization Field Name: Impact_Statement Standard Label: Impact Statement Type: Long Text
CEO Comments (Text provided by the NPO explaining, from the NPO's CEO's perspective, the mission, activities, and impact of the NPO.)	Record Type: Organization Field Name: CEO_Comments Standard Label: CEO Comments Type: Long Text
Funding Sources	Record Type: Organization Field Name: Funding_Sources Standard Label: Funding Sources Type: Long Text

Telephone Fields

GuideStar Field	Field in Gifts Database
Primary Phone Number	Phone
Primary Fax Number	Fax

Address Fields

GuideStar Field	Field in Gifts Database
Primary Address (line 1)	Address
Primary Address (line 2)	Address
City	City
State/Province/Territory	State
Country	Country
Postal Code	Postal Code
Postal Code extension	Record Type: Organization Field Name: postal_code_plus Standard Label: postal code plus Type: Long Number, No Decimal

URL Fields

GuideStar Field	Field in Gifts Database
Website URL	WWW Address

Email Fields

GuideStar Field	Field in Gifts Database
Primary Email Address	E-mail

NTEE Fields

GuideStar Field	Field in Gifts Database
NTEE Code	Record Type: Organization Field Name: NTEE_code Standard Label: NTEE code Type: Text

Financial Fields

GuideStar Field	Field in Gifts Database
Fiscal Year Start Date (First day of the NPO's fiscal year.)	Record Type: Organization Field Name: fiscal_year_start Standard Label: Fiscal Year Start Type: Date
Fiscal Year End Date (Last day of the NPO's fiscal year.)	Record Type: Organization Field Name: fiscal_year_end Standard Label: Fiscal Year End Type: Date
Contrib Gifts Grants (The amount of money donated via contributions, gifts, and grants to this organization.)	Record Type: Organization Field Name: contrib_gifts_grants_amount Standard Label: Contrib Gifts Grants Type: Currency
Program Service Revenue (Program service revenue including government fees and contracts.)	Record Type: Organization Field Name: program_service_revenue_amount Standard Label: Program Service Revenue Type: Currency
Membership Dues	Record Type: Organization Field Name: membership_dues_amount Standard Label: Membership Dues Type: Currency
Special Events Net Income (Net Income acquired from special events not included as part of programs.)	Record Type: Organization Field Name: special_events_net_income_amount Standard Label: Special Events Net Income Type: Currency
Other Revenue Description	Record Type: Organization Field Name: other_revenue_description Standard Label: Other Revenue Description Type: Long Text
Other Revenue	Record Type: Organization Field Name: other_revenue_amount Standard Label: Other Revenue Type: Currency
Total Revenue	Record Type: Organization Field Name: total_revenue_amount Standard Label: Total Revenue Type: Currency
Program Expenses	Record Type: Organization Field Name: program_expenses_amount Standard Label: Program Expenses Type: Currency

GuideStar Field	Field in Gifts Database
Administration Expenses	Record Type: Organization Field Name: administration_expenses_amount Standard Label: Administration Expenses Type: Currency
Fundraising Expenses	Record Type: Organization Field Name: fundraising_expenses_amount Standard Label: Fundraising Expenses Type: Currency
Payments to Affiliates	Record Type: Organization Field Name: payments_to_affiliates_amount Standard Label: Payments to Affiliates Type: Currency
Other Expenses Description	Record Type: Organization Field Name: other_expenses_description Standard Label: Other Expenses Description Type: Long Text
Total Expenses	Record Type: Organization Field Name: total_expenses_amount Standard Label: Total Expenses Type: Currency
Total Assets	Record Type: Organization Field Name: total_assets_amount Standard Label: Total Assets Type: Currency
Total Liabilities	Record Type: Organization Field Name: total_liabilities_amount Standard Label: Total Liabilities Type: Currency
Net Assets Fund Balance EOY (Net Assets or Fund Balance at the end of year.)	Record Type: Organization Field Name: net_assets_fund_balance_eoy_amount Standard Label: Net Assets Fund Balance EOY Type: Currency

Contact Fields

NOTE: Only Organization primary contact fields in GIFTS Alta will match to the Primary contact fields in the Simplify database.

GuideStar Field	Field in Gifts Database
Prefix (Title that precedes a first name or an initial. For example, Mr., Mrs., and Dr. are name prefixes.)	Prefix
First Name	First Name
Middle Name	Middle
Last Name	Last Name
Suffix (A part of a name that follows the last name. For example, Jr. and Sr. are name suffixes.)	Suffix
Title	Title
Status	Record Type: Contact Field Name: status Standard Label: Status Type: Text
Start Month	From
End Month	To
Email Address	E-mail
Compensation	Record Type: Contact Field Name: Compensation Standard Label: Compensation Type: Currency
Bio	Record Type: Contact Field Name: Bio Standard Label: Bio Type: Long Text
Primary Phone	Phone