

EMPOWERED

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UNDERSTANDING A MULTI-PHASE APPLICATION PROCESS IN GOAPPLY

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akoyago

LEARNING OBJECTIVES

1. Gain insight into the structured steps of a multi-phase opportunity in GOapply
2. Learn best practices for creating and managing requirements
3. Understand recent enhancements designed to improve the applicant experience
4. Explore notification examples for each stage, including reminders and confirmations

ABOUT HEALTH FOUNDATION OF SOUTH FLORIDA

We are a nonprofit grantmaking organization serving **Broward, Miami-Dade, and Monroe Counties.**

Our mission is to invest in—and be a catalyst for—collaborations, policy, and systems change that improve the health of South Florida communities, with a focus on vulnerable, low- and moderate-income populations.

Each year, we award approximately **\$3.5 to \$4 million** in grants.

Our strategic goals include:

- **Access to Care:** Improve healthcare access and use among uninsured and underserved communities.
- **Health and Social Needs:** Advance cross-sector collaboration to better integrate social needs into health care and reduce disparities.
- **Thriving Communities:** Promote well-being by addressing the link between community development and health—especially housing and economic opportunity

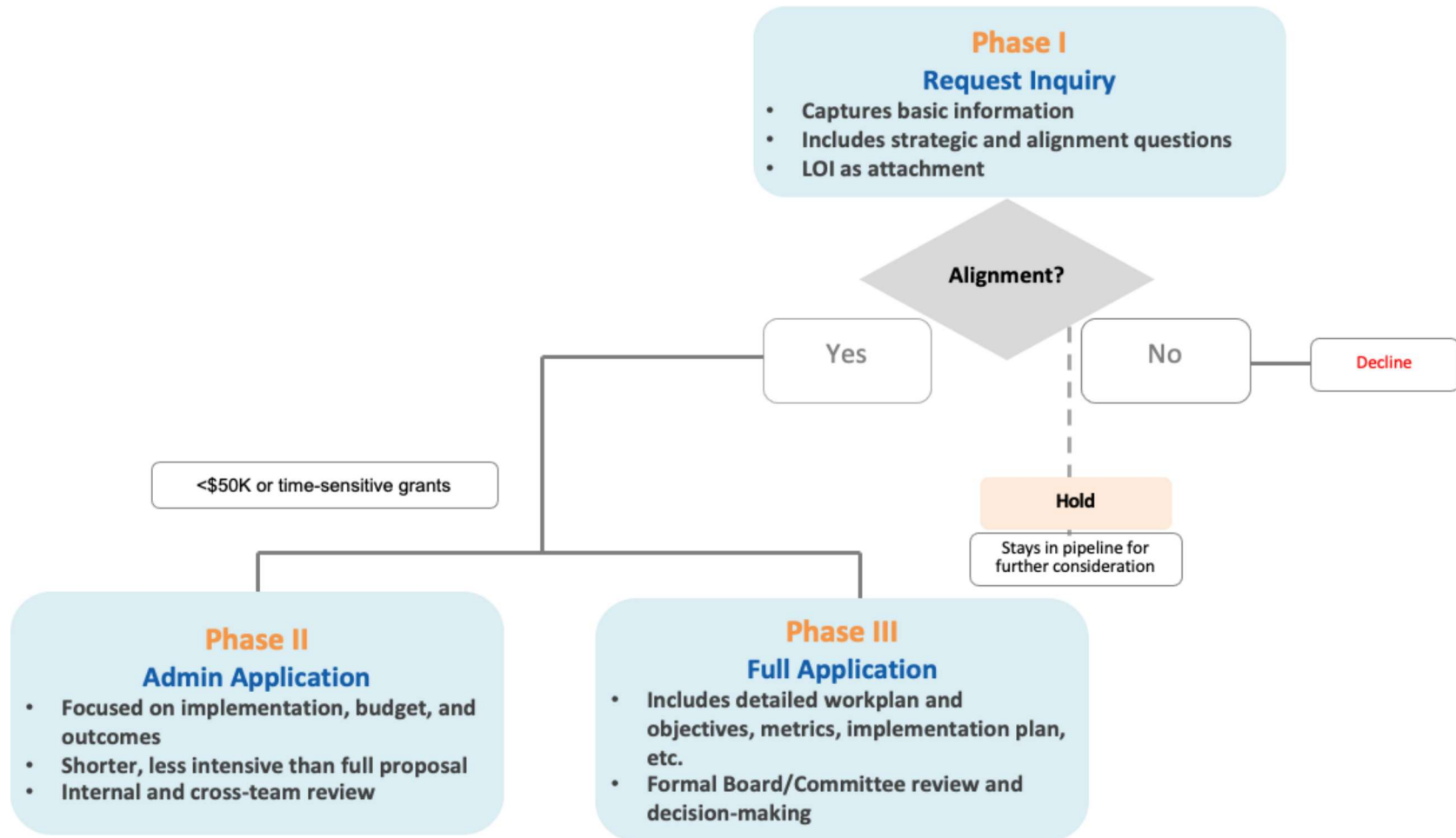
DESIGNING WITH PURPOSE – OUR MULTI-PHASE APPROACH

PRESENTED BY

Any Karina Balza

Health Foundation of South Florida

1. How We Got Here
2. Alignment Comes First
3. Strategically Multi-Phase
4. Meaningful Progression
5. Designed for Insight
6. Built with Applicants in Mind
7. GOapply Enables It
8. Smart, Timed Check-Ins That Reflect the Grant Lifecycle
9. Targeted Email Communications That Support the Grant Lifecycle



MANAGING MULTI-PHASE OPPORTUNITIES

Step 1: Plan Opportunity & Review Group

Step 2: Evaluate akoyaGO

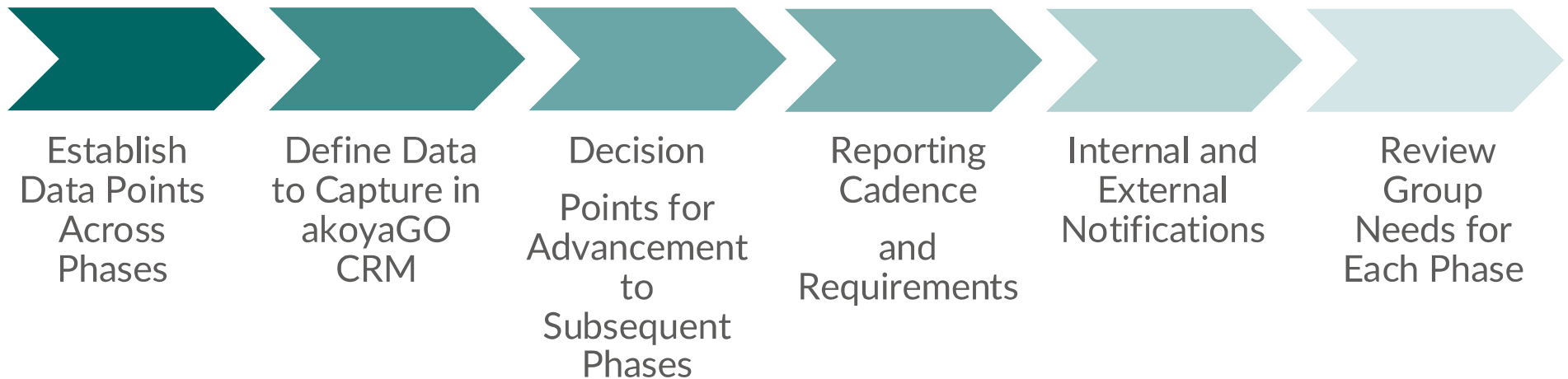
Step 3: Create Opportunity & Design Phases

Step 4: Determine How Opportunity Progresses

Step 5: Configure System Notifications

Step 6: Test Full Life Cycle

STEP 1: PLAN OPPORTUNITY & REVIEW



STEP 2: EVALUATE akoyaGO

Out-of-the-Box Fields

- Prioritize OOB fields for their intended purpose and applicability.

Custom Fields (System Customizer)

- If all required fields for key metrics don't exist, a custom field may be necessary. This should also be added to relevant Forms.

Views and Dashboards (System Customizer)

- Design views and dashboards to include your data collection metrics and track application statuses.

STEP 3: CREATE OPPORTUNITY & DESIGN PHASES

Phase Type

- What is the purpose of the phase?

Phase Order

- Which phases appear and are completed by applicants first?

Phase Due Date

- When should Applicants complete each Phase?

STEP 3: CREATE OPPORTUNITY & DESIGN PHASES

Reviewer
Access

- What details from the submission should be hidden from the Reviewer?

Data
Collection

- What information needs to be captured in akoyaGO (mapped to the appropriate Table and Column in akoyaGO)

Attachments

- What data can be provided by the Applicant as a file instead of a mapped response?

STEP 4: DETERMINE HOW OPPORTUNITY PROGRESSES

"Advance To" Command

- **Manually** move an applicant to the next phase and generate Status Tracking
- If Phase Type = Interim/Final Report, this will also create an associated Requirement
- Managed from **Request**

Advance to Next Phase Automatically

- **Automatically** move an applicant to the next phase and generate Status Tracking upon submission
- If Phase Type = Interim/Final Report, this will also create an associated Requirement
- Managed on the **Phase Record**

"Create All Requirements" Process Workflow

- Manually generate Status Tracking's for all reporting phases at once
- If Phase Type = Interim/Final Report, this will also create all associated Requirements
- Managed from Request

STEP 5: CONFIGURE SYSTEM NOTIFICATIONS

Report Reminders

- 15 Days ahead, 30 days ahead, etc.

Send on Behalf

- Enabled in Personalization Settings of akoyaGO

Best Practice

When deciding who notifications are sent from, utilize our OOB "Internal Phase Contact" (GOapply Opportunity) or "Foundation Contact" (GOapply Settings).

When creating new processes, always reference an Email Template in the "Send Email" step. Email Templates can be configured in the Email Templates table for consistency and efficiency.

STEP 5: CONFIGURE SYSTEM NOTIFICATIONS

GOapply User Already Exists

This email is sent out to reviewers who have been added as a reviewer and they already have an established GOapply account. This email is sent via code.

GOapply - Verify Individual Account

This email is sent to all new individual GOapply users. It is also sent to new organization users when the GOapply Settings record has "Enable Email Verification" set to "Yes." This email is sent via code.

GOapply - Verify Organization Account

Sends email verification to users who register with as an organization if "Enable Email Verification" is set to "Yes" on GOapply Settings record. This email is sent via code.

GOapply - Reset Password

This email is an editable email template as well, offering a GOapply user a link to reset their password. This email is sent via code.

STEP 5: CONFIGURE SYSTEM NOTIFICATIONS

GOapply - Approval/Denial Email Response to Registrant

This email is sent to the GOapply User (organization users only) to notify them that their request to access the GOapply Portal when the GOapply Settings record has the "Applicant Approver" set to either 'Foundation Staff' or 'GOapply Contact'. The "GOapply Approval/Denial Email response to Registrant" Process Workflow must be enabled for this email to send.

GOapply - Foundation Applicant Approval Email

This email is sent to the GOapply User (organization users only) to notify them that their request to access the GOapply Portal when the GOapply Settings record has the "Applicant Approver" set to 'Foundation Staff'

GOapply - GOapply Contact Applicant Approval

This email is sent to the GOapply Contact (if one is listed on the constituent record in the 'GOapply Contact' field) when the GOapply Settings record has the "Applicant Approver" field set to 'GOapply Contact'

GOapply - Invite Constituent to Apply

This email is sent via code to all the GOapply Users associated with a constituent from the Foundation Contact. This email is triggered when you click the "Invite to Apply" button on a constituent record or a view of constituent

STEP 5: CONFIGURE SYSTEM NOTIFICATIONS

GOapply - Recommendation Request

Recommendation Request: If a GOapply application is requesting the applicant to provide information for individuals they use as a reference (as in, if the "Recommendation" panel is in the GOapply application), this is the email that will be sent to the individual they put in that "Recommendation" panel. If the applicant filled in the "Note in email" field, that will be displayed in this email as well. This email is sent via code.

GOapply Transcript Request

If a GOapply application is requesting the applicant to provide a transcript (as in, if the "Transcript" panel is in the GOapply application), this is the email that will be sent to the individual they put in that "Transcript" panel. This email is sent via code.

GOapply - Recommendation/ Transcript Updated-

This email is sent to the applicant when a third-party responder has completed their recommendation/transcript upload. This email is sent via code.

GOapply - Individual Applicant Reminder Email

A workflow exists on the GOapply Status Tracking record to send the applicant a reminder that the application deadline is approaching. From the Status Tracking record, click Flows and choose GOapply *Send Individual Applicant Reminder Email*. This will generate an email to the applicant with the application name and due date.

EMAIL TEMPLATES

GOapply Reviewer Complete Thank You

This email template is used by the process workflow "GOapply - Reviewer Complete Thank You." It is sent to the reviewer when the "Review Complete" field on the "Reviewer" record is set to "yes." This happens automatically when a reviewer finished all of the applications assigned to them in all of their review groups.

GOapply Submission Confirmation to Applicant

This email is sent to the GOapply User to notify them that their submission was successful. *GOapply Submission Confirmation to Applicant From Template Workflow Process* must be enabled.

GOapply Submission Staff Confirmation

This email is sent to the Foundation Contact listed on the GOapply Settings record if the *GOapply Submission Staff Notification* process workflow is enabled.

GOapply - GOapply Contact Applicant Approval

This email is sent to the GOapply Contact (if one is listed on the constituent record in the 'GOapply Contact' field) when the GOapply Settings record has the "Applicant Approver" field set to 'GOapply Contact' (process Workflow).

Create Opportunity

Create all subsequent phases

Publish Opportunity

Register in GOapply as a new user

Complete all questions in Phase 1 and Submit

Review akoyaGO records created by submission for accuracy

Advance Request to next phase

Test next phase in GOapply

Repeat testing in GOapply for any additional phases

Create and configure reviewer elements

Register a reviewer and test Review Group Application in GOapply

Review Reviewer Responses and scoring in akoyaGO for accuracy

RESOURCES

[GOapply Admin Guide](#)

[Testing Best Practices](#)

THANK YOU

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