

Adding a Collaborator

Step 1: On user dashboard. Click the edit button on the form you are wishing to add a collaborator on.

The screenshot shows the Valley Baptist Legacy Foundation dashboard. At the top, there is a navigation bar with the organization's name and a user profile icon. Below this, there are tabs for 'Active Requests' (1) and 'Historical Requests' (7). The main content area is titled 'Access to Care' and displays details for a '2023-2020 Responsive Grant Program'. It includes a table of 'Follow Up Forms' with columns for Form Name, Assigned To, Award / Installment, Due Date, Status, and Edit/View. The 'Final Progress Report for Responsive Grants' form has an 'Edit' button circled in red.

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Electronic Signature Agreement - Responsive	Name	Overall Award		Complete	View
Final Progress Report for Responsive Grants	Name	Overall Award	10/16/2024	Assigned	Edit

Step 2: Once the page opens, click on the blue “Collaborate” button on the top right of your screen.

The screenshot shows the 'Follow Up' page for a project. The page includes a 'Public Profile' button and a 'Collaborate' button with a user icon and a '0' notification, which is circled in red. Below the 'Collaborate' button, there are tabs for 'Contact Info', 'Request', 'Award Details', and 'Documents' (2). The 'Applicant' and 'Organization' sections are visible, each with a pencil icon for editing.

Step 3: Once the window appears, add the desired collaborator’s email, a message you wish to be sent with your invitation to collaborate, and click the desired permissions for the user. Click “Invite”. User will then receive invitation to be able to work with you on form.

The screenshot shows the 'Collaborate' modal window. It has a title bar with a close button. The main content area includes a text input field for 'Invite someone', an 'Email Address' field with a placeholder 'Email address / username of the person you are inviting', and a 'Message' field with a placeholder 'This message from you will be included in the email that is sent to the person you are inviting'. There is a 'Permissions' section with three radio buttons: 'Can view', 'Can edit' (selected), and 'Can submit'. At the bottom, there are 'Cancel' and 'Invite' buttons.