

Mosaic User Guide for Grant Applicants

Introduction

Kaiser Permanente is pleased to announce our new online application system, **Mosaic**. We are confident that Mosaic will ensure a user-friendly and efficient experience for our applicants.

Kaiser Permanente uses an online application process to receive and review requests for event sponsorships and grants and to help potential applicants determine if they are eligible to apply for these programs.

To access our funding opportunities and submit a proposal, visit <https://mosaic.versaic.com>. Mosaic, is accessible via any modern web browser such as Chrome, Safari, or Firefox. You can save this [URL](#) to return to the portal and to access any proposal you have started or submitted.

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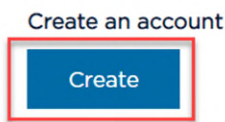
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Creating an account with Mosaic

If this is the first time you are using our new Mosaic portal, you will need to create a new account as accounts from our previous system do not carry over. **Please note that creating an account in Mosaic does not guarantee funding.**

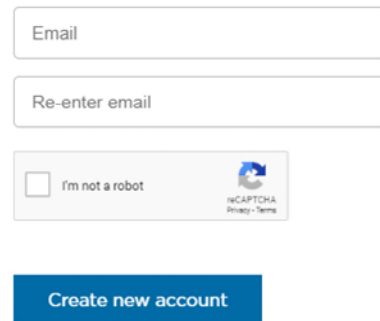
Account creation requires a two-step authentication process which ensures that you receive any future notifications from our system.

1. Go to the Log-in page at <https://mosaic.versaic.com>
2. To create an account, click **“Create”** under Create an account.



If this is your first time using our system, please click on “Create” under “Create an account”. If you have any questions, please [Contact Us](#).

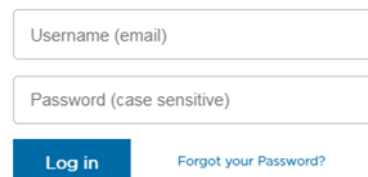
3. At the next screen, follow the instructions to enter your email address (it must be one that you personally have access to), which will serve as your username.
4. Check the **“I am not a robot”** box and click **“Create an Account.”**
5. You will receive an email from no-reply@versaic.com with instructions to complete your account creation. Upon successful account creation, you may log into your account.

A screenshot of a web form for account creation. It includes two input fields for "Email" and "Re-enter email". Below these is a checkbox labeled "I'm not a robot" next to a reCAPTCHA logo. At the bottom is a blue button labeled "Create new account".

Logging into Mosaic

Once you have created an account, you may log in by entering your username and password.

1. Go to the Log-in page at <https://mosaic.versaic.com>
2. Enter **Username (email)**
3. Enter **Password (case sensitive)**

A screenshot of a web login form. It features two input fields: "Username (email)" and "Password (case sensitive)". Below the password field is a blue "Log in" button and a link that says "Forgot your Password?".

PLEASE NOTE: After 6 failed login attempts, your account will be locked for 15 minutes. To reset your password, please click [here](#).

Navigating the Home Page

At the home page you can access your account settings (where you can update your email, password, or transfer the account as necessary), begin a new application, or access any applications you have started or submitted.

The screenshot shows the Kaiser Permanente Home Page. At the top left is the Kaiser Permanente logo. To the right are navigation buttons for 'Home' and 'Help', and a user profile for 'Vladimir Kozak'. Two red callout boxes point to the 'Home' and 'Help' buttons, with text: 'Request Technical Assistance from Versaic' and 'Your account settings'. Below the navigation is the heading 'Home Page' and a paragraph: 'To begin the process to submit a proposal to Kaiser Permanente:'. This is followed by a numbered list of three steps: 1. First determine if you meet Kaiser Permanente's funding criteria and which program is most appropriate by clicking 'Get Started.' You will be taken to an eligibility questionnaire. 2. If you meet Kaiser Permanente's funding criteria and the relevant program is accepting applications, you will be able to complete a proposal. 3. Complete the proposal as required and click "Submit." Below the list is a paragraph: 'You can go to the Help tab - located on the above Navigation Menu - for useful information that can help guide you through our intake process.' To the right of this text is a 'Notifications' box with a blue header and a notification: 'You have a saved but not completed submission "Proposal Not Completed". Click on the name from the list below to complete.' Below the main content is a blue 'Get Started' button. Underneath is a section titled 'Welcome to your application hub!' with a sub-heading and a paragraph: 'Here, you can complete your application, and stay up-to-date on the status of your application.' Below this is another paragraph: 'All of your saved and submitted proposals will appear below for you to access any time. Click on the name of your proposal to view what you have entered, to print your records or to take any available actions as needed. To submit a new proposal, click the "Get Started" button above.' To the left of this paragraph is the heading 'Quick Tips:'. Below the paragraph is another paragraph: 'If the "DUPLICATE" button is shown on your screen, you have the opportunity to auto-populate some of your previously submitted information. To do so, please click on the "Duplicate" link next to the Proposal. Once your Proposal is duplicated, your organization information will be copied over, i.e., Organization Name, etc. You will then need to update the request details as well as fill in the information for the new request.' A red callout box points to the 'Get Started' button with text: 'Access to any applications you have started or submitted'. At the bottom is a table with the following columns: Project Title, Request Type, Request ID, Status, Creation Date, and Other Actions.

KAISER PERMANENTE

Home Help Vladimir Kozak

Request Technical Assistance from Versaic

Your account settings

Home Page

To begin the process to submit a proposal to Kaiser Permanente:

1. First determine if you meet Kaiser Permanente's funding criteria and which program is most appropriate by clicking 'Get Started.' You will be taken to an eligibility questionnaire.
2. If you meet Kaiser Permanente's funding criteria and the relevant program is accepting applications, you will be able to complete a proposal.
3. Complete the proposal as required and click "Submit."

You can go to the Help tab - located on the above Navigation Menu - for useful information that can help guide you through our intake process.

Notifications

You have a saved but not completed submission "Proposal Not Completed". Click on the name from the list below to complete.

Get Started

Welcome to your application hub!

Here, you can complete your application, and stay up-to-date on the status of your application.

All of your saved and submitted proposals will appear below for you to access any time. Click on the name of your proposal to view what you have entered, to print your records or to take any available actions as needed. To submit a new proposal, click the "Get Started" button above.

Quick Tips:


If the "DUPLICATE" button is shown on your screen, you have the opportunity to auto-populate some of your previously submitted information. To do so, please click on the "Duplicate" link next to the Proposal. Once your Proposal is duplicated, your organization information will be copied over, i.e., Organization Name, etc. You will then need to update the request details as well as fill in the information for the new request.

Access to any applications you have started or submitted

Project Title	Request Type	Request ID	Status	Creation Date	Other Actions
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Starting a new application

Once you have created an account, you may log in by entering your username and password.

1. Log into Mosaic
2. Click **"Get Started"** on the Home Page 
3. Click **"Next"** to reach the Access Code page

4. On this page, you will be prompted to indicate whether you were provided an access code. Select “Yes” and then click “Next”

Access code

*Were you provided with an access code?

Yes
 No

<< Back Next >>

5. Enter the access code that was provided to you by the Kaiser Permanente representative

Provide Access Code

*Please provide the access code

<< Back Next >>

6. By clicking “Next”, you will be directed to the grant application

Uploading Required Documents

To complete the online grant application in Mosaic, the following documents must be uploaded:
(doc, docx, xls, xlsx, mpp, txt, pdf, jpg, jpeg, png, ppt, pptx, mp3 file formats are acceptable)

1. Organization's W9 Form *(download the W9 form from the IRS database [here](#))*
2. Organization's Board of Directors *(their affiliations must be listed)*
3. Organization's Executive Officers or Leadership Team *(names and titles must be listed)*
4. Project Budget *(provided template must be used)*

Optional: Any additional information that you would like Kaiser Permanente to consider
(e.g. annual report, strategic plan, relevant media coverage, success stories, etc.)

If your organization is using a Fiscal Sponsor, you will be required to upload these additional documents:

- Fiscal Sponsor's W9 Form *(download the W9 form from the IRS database [here](#))*
- Fiscal Sponsor's Board of Directors *(their affiliations must be listed)*
- Fiscal Sponsor's Executive Officers or Leadership Team *(names and titles must be listed)*
- Existing Memorandum of Understanding (MOU) or other contractual agreements

PLEASE NOTE: A Request on Letterhead is no longer a required document for Kaiser Permanente grant applications.

Saving an Incomplete Application

At the bottom of the application, click **“Save”** to keep working or click **“Save and Close”** to save your work and close the application.



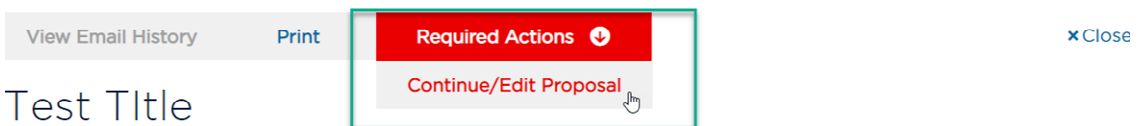
PLEASE NOTE: Clicking "Cancel" will cancel the current application and no changes will be saved.


Returning to an Incomplete Application

1. At the home page under your Application Hub, find your application and click on the project title

	Project Title	Request Type	Request ID	Status	Creation Date -	Other Actions
🔍	Test Title	Grants	3147	Not Completed	10/3/2018	Delete

2. At the next page, hover your mouse over the **Required Actions** menu and then click **“Continue/Edit Proposal”**



You can review your answers below. If additional actions are required, you will see a "Required Actions" button above. To continue filling out your application, please mouse over the  button at the top of the page. Click on the drop-down menu that appears.

Application Question Guidance

National/Local Program

On the “National/Local Program” page of the Eligibility Questionnaire, you will be asked to select the Kaiser Permanente funding office that is most appropriate to handle your request.

Please follow the steps below to access Northern California applications:

1. Under “Is your Request for Local or Nation Program/Event?” select **“Local”** (see example below)

*Is your Request for a Local or National Program/Event?

- Click **“National”** if your Program/Event serves **more than one** of the 8 regions mentioned above;
- Click **“Local”** if your Program/Event serves **only one** of the 8 regions mentioned above;
- Click **“Other”** if your Program/Event **does not serve in any** regions from above.

- National
- Local
- Other

- Under “Please select the Region where your Program/Event will take place” select “**Northern California**” (see example below)

*Please select the Region where your Program/Event will take place

- Northern California
- Southern California
- Colorado
- Georgia
- Hawaii
- Mid-Atlantic States (Virginia, Maryland or DC)
- Northwest (Oregon and Southwest Washington)
- Washington

Executive Officers or Leadership Team Listing

On page 1 of the application (under the “Organization's Mission & History” section), you will be instructed to upload a listing of your Executive Officers or Leadership Team. Please include the names and titles of all executive/leadership staff.

PLEASE NOTE: This a required field and a document must be uploaded in order to proceed.

*Upload a listing of your Executive Officers or Leadership Team

- File Size: Up to 10MB
- File Type: doc, docx, xls, xlsx, mpp, txt, pdf, jpg, jpeg, png, ppt, pptx, mp3

Community Health Need

On page 4 of the application (under the “Project Information” section), you will be instructed to select the Community Health Need for which your project will address.

Please following the instructions below on how to answer this question appropriately:

- Click on the “**Add Answer**” button

Option	Percentage	Primary
Sum : 0		
<input type="button" value="Add Answer"/>	<input type="button" value="Distribute Equally"/>	<input type="button" value="Delete All"/>

- Select only one Community Health Need that best describes your project by checking the small box on the left. Then, click on the **“Add Selected”** button.

Select Reference Items

FILTER

Community Health Need: Focus Area:

<input type="checkbox"/>	Community Health Need	Focus Area
<input checked="" type="checkbox"/>	Access to Care & Coverage	Access to Care
<input type="checkbox"/>	Community & Family Safety	Violence/Injury Prevention
<input type="checkbox"/>	Early Childhood Development	Economic Security
<input type="checkbox"/>	Education	Economic Security
<input type="checkbox"/>	Healthy Eating, Active Living	Obesity/HEAL/Diabetes
<input type="checkbox"/>	Mental & Behavioral Health	Behavioral Health
<input type="checkbox"/>	N/A (Not Applicable)	N/A (Not Applicable)
<input type="checkbox"/>	Other	Other

- The selected Community Health Need should appear under the “Option” column, then select **“Distribute Equally”**

Option	Percentage	Primary	
Access to Care & Coverage	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="button" value="Delete"/>

Sum : 0

- “100” should appear under the “Percentage” column and “Sum: 100” should appear below the text box

Option	Percentage	Primary	
Access to Care & Coverage	<input type="text" value="100"/>	<input type="checkbox"/>	<input type="button" value="Delete"/>

Sum : 100

City(ies) where your project's activities take place

On page 4 of the application (under the “Project Information” section), you will be instructed to select the city(ies) served by the project for which you are seeking funding.

To search by city:

1. Click on the **“Add Answer”** button

Option Percentage Primary
Sum : 0

Add Answer **Distribute Equally** **Delete All**

2. To filter by city, type in the city name and select **“Apply Filter”**

FILTER

City: County: Region: **Apply Filter** Clear

To filter by county, choose a county from the drop-down menu and select **“Apply Filter”**

FILTER

City: County: Region: **Apply Filter** Clear

<input type="checkbox"/>	City	County	Region
<input type="checkbox"/>	Acalanes Ridge	Alameda	NCAL
<input type="checkbox"/>	Acampo	Alameda	NCAL
<input type="checkbox"/>	Ahwahnee	Alameda	NCAL
<input type="checkbox"/>	Alameda	Alameda	NCAL
<input type="checkbox"/>	Alamo	Alameda	NCAL
<input type="checkbox"/>	Albany	Alameda	NCAL
<input type="checkbox"/>	Alhambra Valley	Alameda	NCAL
<input type="checkbox"/>	Allendale	Alameda	NCAL
<input type="checkbox"/>	Alpaugh	Alameda	NCAL
<input type="checkbox"/>	Alta	Alameda	NCAL
<input type="checkbox"/>	Alta Sierra	Nevada	NCAL

Add Selected **Cancel**

3. Select the city(ies) by checking the small box(es) on the left. Then, click on the **“Add Selected”** button.

FILTER

City: County: Region: **Apply Filter** Clear

<input type="checkbox"/>	City	County	Region
<input checked="" type="checkbox"/>	Oakland	Alameda	NCAL

1 of 1 (1 items)

Add Selected **Cancel**

- The selected city(ies) will appear under the “Option” column, then select “**Distribute Equally**”. The appropriate percentages will populate under the “Percentage” column.

Option	Percentage	Primary	
Oakland	<input type="text" value="0"/>	<input type="checkbox"/>	Delete

Sum : 0

Attestations for Organizations without Fiscal Sponsors

In order to complete your application, ALL questions listed under the Attestation section (page 7) must be answered. Even if your organization does NOT have a fiscal sponsor, you are still required to answer both the **Non-Discrimination Policy - Fiscal Sponsor** and **Non-Proselytizing Policy - Fiscal Sponsor** questions.

For organizations without a fiscal sponsor, please answer accordingly:

For the **Non-Discrimination Policy - Fiscal Sponsor** question, please select “**YES**” (see example below)

*Non-Discrimination Policy - Fiscal Sponsor: Does the fiscal sponsor organization have a documented policy which prohibits discrimination in its programs, services, policies, hiring practices and administration on the basis of race, color, ethnicity, ancestry, national origin, age, gender, gender identity or expression, sexual orientation, marital status, or physical or mental disability?

- Yes
- No

For the **Non-Proselytizing Policy - Fiscal Sponsor** question, please select “**NO**” (see example below)

*Non-Proselytizing Policy - Fiscal Sponsor: If the fiscal agent organization is a religious or faith-based organization, will any portion of the grant be used to support general operations, services and programs of the congregation/membership/students, or to advance religious doctrine or philosophy?

- Yes
- No
- N/A - not a religious or faith-based organization

Submitting your Completed Application

When you have completed your application, please remember to review your responses and save it before submitting.

- To review your responses before submitting, use the “**Back**” button
- To save edits made to your application, select “**Save**”
- To save edits and exit out of your *incomplete* application, select “**Save & Close**”
- To submit your *completed* application, select “**Submit**”
- To leave the application without saving edits, select “**Cancel**”

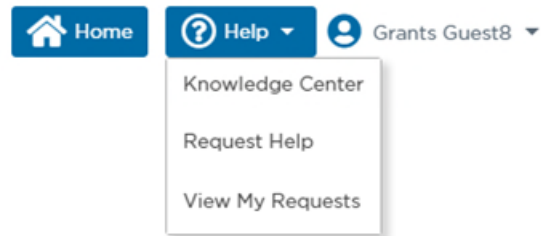
After you click the "Submit" button (*bottom right of the page*), your application will be sent to Kaiser Permanente for review and you will not be able to make any further changes. An email will be sent to the Application Contact confirming receipt of the application. Also, at the Home Page, you will see your application and the status should be listed as "Under Consideration."

PLEASE NOTE: Do not use the back button **in your web browser** as this may result in a loss of your work.

Requesting Technical Assistance

Log into Mosaic, click the "**Help**" button on the top right of the page and then click "**Request Help**." You will be able to enter your question on the next page.

PLEASE NOTE that when requesting technical assistance for the site, you are submitting your request to **Kaiser Permanente's vendor, Versaic**.



Versaic hosts the Mosaic platform and can only assist you with questions about using the Mosaic site. Versaic cannot answer any questions about your eligibility to apply for funding, the status of your proposal, or about Kaiser Permanente's charitable contributions in general. For answers to these questions, please contact your Kaiser Permanente Community Benefit representative.