Mosaic User Guide for Sponsorship 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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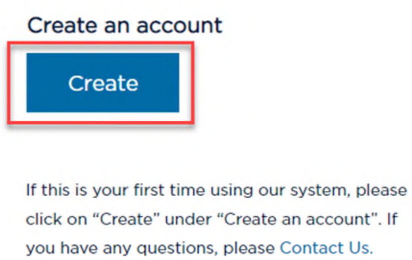
Creating an account with Mosaic

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

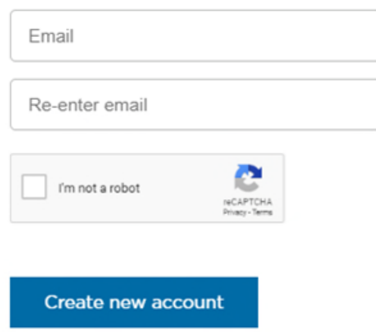
2. To create an account, click **"Create"** under Create an account.



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."**

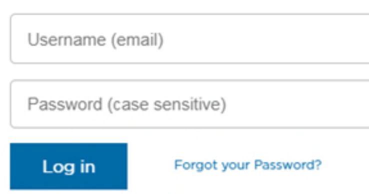
5. You will receive an email from **no-reply@versaic.com** with instructions to complete your account creation. Upon successful account creation, you may log into your account.



Logging into Mosaic

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

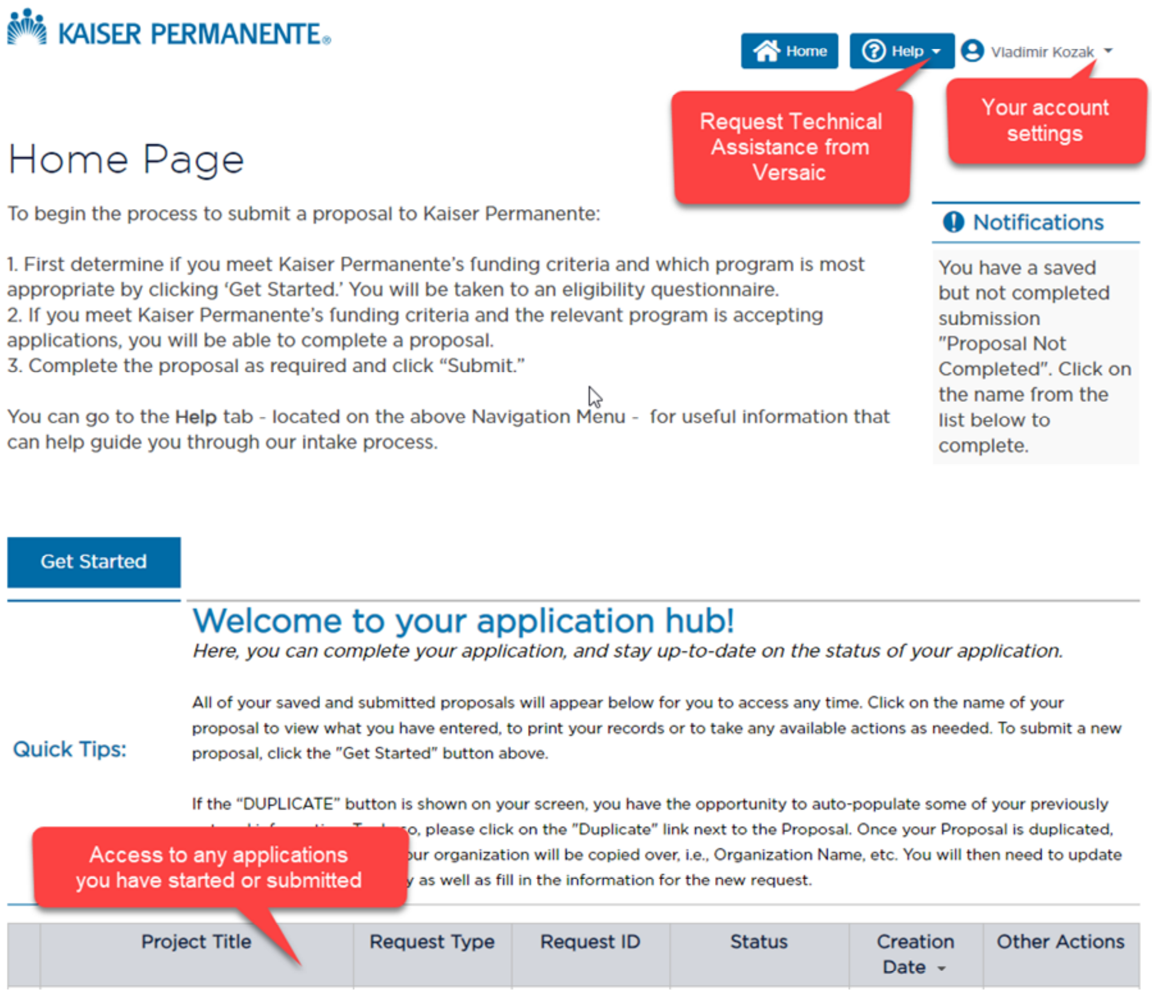
1. Go to the Log-in page at https://mosaic.versaic.com
2. Enter **Username (email)**
3. Enter **Password (case sensitive)**



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.



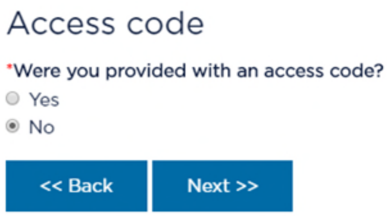
Starting a new application

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 begin the Eligibility Questionnaire

4. On the Access Code page, select **"No"**, then click **"Next"**



5. Continue answering the Eligibility Questionnaire

6. Upon successful completion of Eligibility Questionnaire, you will automatically be directed to the appropriate application

Uploading Required Documents

To complete the online sponsorship 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. List of all available sponsorship levels and associated benefits

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 sponsorship 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.

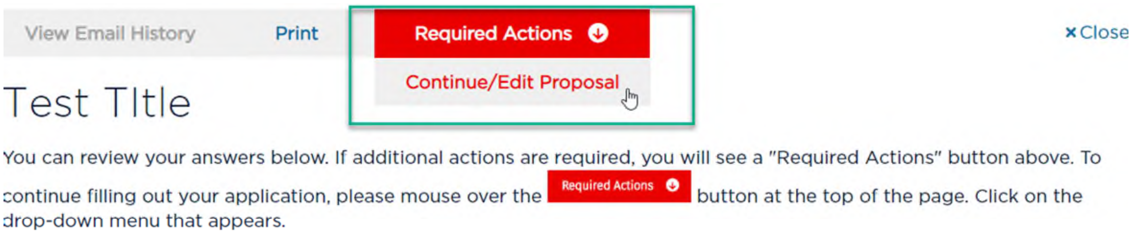
PLEASE NOTE: Clicking "Cancel" will cancel the current application and no changes will be saved.

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	Sponsorships	3143	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"**



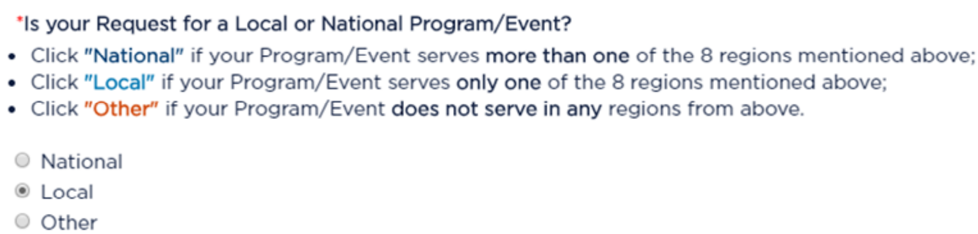
Application Question Guidance

National/Local Program

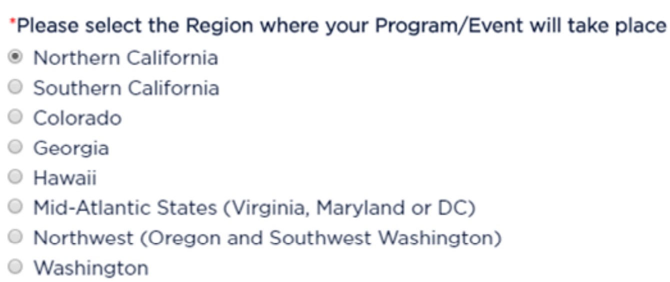
On the "National/Local Program" page of the Eligibility Questionnaire, you will be asked to select the Kaiser Permanente funding office that is most appropriate to handle your request.

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)*



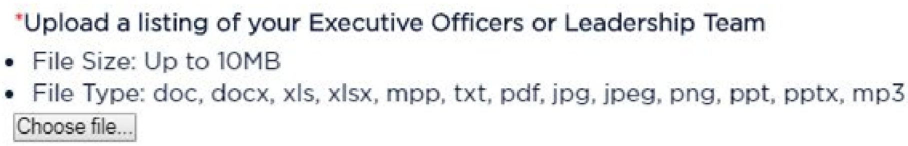
2. Under "Please select the Region where your Program/Event will take place" select **"Northern California"** *(see example below)*



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 <u>names and titles</u> of all executive/leadership staff.

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

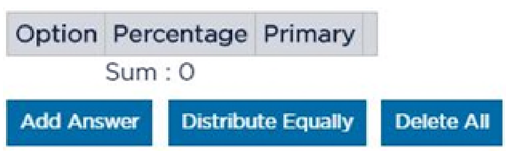


Community Health Need

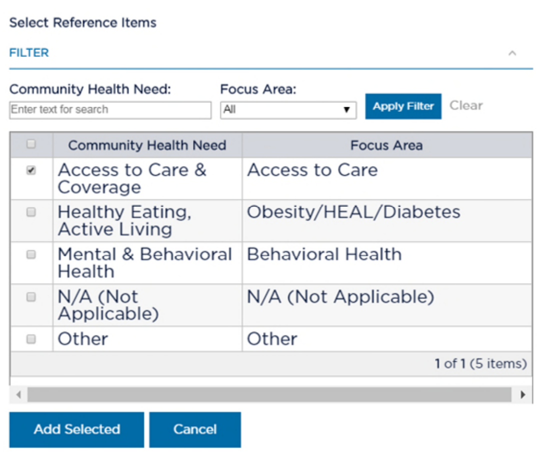
On page 3 of the application (under the "Event Information" section), you will be instructed to select the Community Health Need which your project will address. Information related to the Community Health Need is not mandatory for Northern California applications, however it is a required field that must be answered.

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

1. Click on the **"Add Answer"** button



2. Select <u>one</u> Community Health Need that best fits your project by checking the small box on the left. Then, click on the **"Add Selected"** button.



<u>PLEASE NOTE</u>: If your project does <u>not</u> address any of the listed community health needs, please select **"N/A (Not Applicable)"**

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

Option	Percentage	Primary	
Access to Care & Coverage	0		Delete

Sum : 0

Add Answer | Distribute Equally | Delete All

4. “100” should appear under the “Percentage” column and “Sum: 100” should appear below the text box

Option	Percentage	Primary	
Access to Care & Coverage	100		Delete

Sum : 100

Add Answer | Distribute Equally | Delete All

Tangible Benefits associated with level of sponsorship

Information related to tangible benefits (page 4 - Sponsorship Benefits) is not mandatory for *Northern California* applications. However, this question is a required field and must be answered in order to move forward.

Please answer this question by entering the number **“0”** for the dollar value *(see example below)*

*What is the dollar value of the tangible benefits associated with the proposed sponsorship level?

More Information: Tangible Benefit is a good faith estimate of the value of goods and/or services, if any, that your organization will provide Kaiser Permanente in return for a contribution. View Example

Directions: Enter 0 if no Tangible Benefit. Do not include currency symbols.

0

Attestations for Organizations without Fiscal Sponsors

In order to complete your application, ALL questions listed under the Attestation section (page 5) must be answered. Even if an 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.

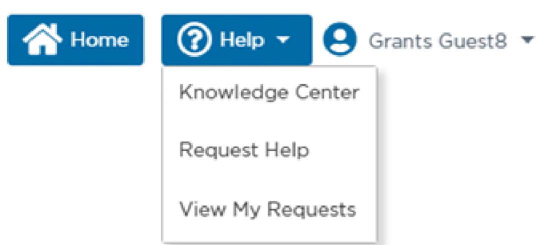
- To review your responses before submitting, use the **“Back”** button
- To save edits made to your application, select **“Save”**
- To save edits <u>and</u> exit out of your *incomplete* application, select **“Save & Close”**
- To submit your *completed* application, select **“Submit”**
- To leave 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.”

<u>**PLEASE NOTE**</u>**:** 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 local Kaiser Permanente Public Affairs or Community Benefit representative.