



United Way of Southwest Alabama Partnership Application Submittable Step-by-step Walkthrough Instructions

After clicking on the link, you will be taken to the Submittable Main Page.

Click on the green “Apply” box in the top right corner of the page.

You will be taken to a login page, where you will need to create your User ID. You will also create the info page for your agency, which will including uploading some required documents.

- This will be the only time you have to upload them until they expire.

To create an account:

1. Click I’m a New User in the top left of the box.
2. Enter your information and set a password.
3. Click “Create Account”

You will receive a code to the email you registered with to verify the email. Once you’ve entered the code from the email, you will be taken to the Organization Profile page. You can try searching for your agency, but you will more than likely need to click the box that says “Create New Organization”.

To create a new organization:

1. Complete the requested information.
2. For Organization Contacts, please include any department heads, assistants, staff members who may need access to the site. You will be able to add them once you

have started the application process and they will be able to edit and upload for you!

3. You'll need to upload the following documentation
 - a. IRS Letter of Determination
 - b. EIN Number
 - c. Form 990
 - d. Audit (most recent within the last 18 months)
 - e. Current Board List
 - f. List of Programs & Services

Once you have uploaded your documents, you will be taken to an Eligibility Page. This will determine whether or not you are eligible for partnership. Please note that we will request documentation for all requirements listed on this page.

If you are eligible for partnership, you will move to the Partnership Application next. This is broken into three parts and should be self-explanatory.

1. Agency Information Cover Page
2. Affirmation of Principles
3. Agency Certification

There is a button at the top of the application that will allow you to add collaborators. I believe they will also have to create login names for the platform, but they will be able to make edits and upload documents as needed. This will be a great asset for your Board Chair, who may not always be in the office.

If you have any questions, contact Lindsay Lum at llum@uwswa.org or 251.433.3624.