

# WizeHive Instructions for Applicants to Evidence for AI in Health (EVAH) RFP

EVAH is using the online platform WizeHive to collect proposals. You will submit your application, including relevant attachments, through WizeHive. Below are instructions to help you access and navigate the system.

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## Contact Information & Feedback Form

- **Questions?** For technical support, send an email to the initiative team at [evah@povertyactionlab.org](mailto:evah@povertyactionlab.org), and copy [application\\_help@povertyactionlab.org](mailto:application_help@povertyactionlab.org).
- **Feedback:** WizeHive is a new system. While J-PAL staff have tested it extensively, we welcome any feedback on these instructions or the system generally. Please provide such feedback (anonymously) [in this brief form](#) or send an email to [git@povertyactionlab.org](mailto:git@povertyactionlab.org).

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## Accessing WizeHive

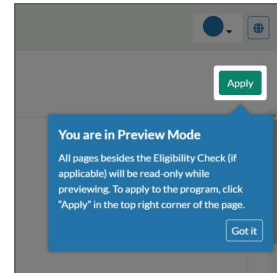
You can access the **WizeHive application portal for EVAH** via the application link on the [RFP webpage](#).

**Please ensure you have clicked on the EVAH-specific application link to begin.** At this time in WizeHive, **it is not possible to delete an application once it is started.**

**The person who creates the application initially will automatically be listed as the Lead Applicant.** The lead applicant organization is expected to be the primary award recipient and accountable organization. If the individual who starts the application is not the lead applicant, they can reassign the “Lead Applicant” role in the [Add/ Manage Collaborators section](#).

Please note that **only those with the role of “Lead Applicant” can submit the application.** See the [Add / Manage Collaborators section](#) for instructions and more information.

When you click on the application link, it will take you to EVAH’s Program Information Page on WizeHive. The application and all links will be in **Preview Mode**. This means all links will be read-only until you sign up for a new account or log in to your existing account.

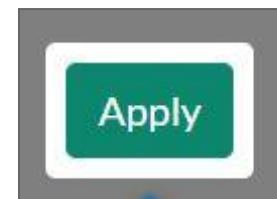


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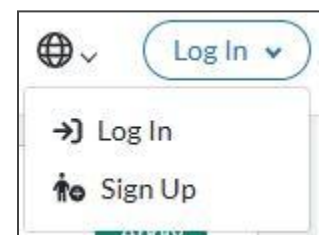
## Signing Up & Logging In to WizeHive

**To submit an application, you will be required to create an account with WizeHive.** After you create your account, you will be prompted to create a profile.

When you click on the green **APPLY** button without being logged in, the system will prompt you to log in or sign up for an account.



Alternatively, you can click on the **Log In** dropdown, in the upper-right corner of the webpage, and select whether you would like to **Log In** or **Sign Up**.



## SIGN UP / CREATE AN ACCOUNT

I'm a new user | I already have an account

Create an account for Abdul Latif Jameel Poverty Action Lab (J-PAL)

Signup with Google

OR

First name | Last name

Email

Password | Confirm

Use 6 or more characters, including at least one upper case character and one lower case character and one digit.

Create Account

You agree to the software's [Terms of Service](#) and [Privacy Policy](#).

### Enter your account details and create your password.

In the upper-right corner of the webpage, click on the words to "Log In". When you click "Sign Up" you will be prompted to enter your:

- First Name
- Last Name
- Your email address (Username)
- Create and confirm your password

Please note the sign up/log in for the portal is case sensitive. You can also sign up using your Google account by selecting "Signup with Google." *Note:* when you log in to the portal again, you need to use the same exact method used to create your account—either email address and password OR "Signup with Google."

← **Click the button to Create Account**

J-PAL

You have selected this email address as your new Abdul Latif Jameel Poverty Action Lab (J-PAL) account on NextZen. To verify this email address belongs to you, please enter the code at the bottom on the email verification page.

Why did you receive this email?

Abdul Latif Jameel Poverty Action Lab (J-PAL) requires verification for all email addresses used for creating accounts. You cannot use your account till it's verified.

If you did not make this request, you can ignore this email.

3 4 1 7 9 2

This code will expire 10 minutes after this email is sent.

POWERED BY wizehive

←**Verify your email.** An email with a six-digit verification code will be sent to the email address provided as your username. This email sender will be "Abdul Latif Jameel Poverty Action Lab (J-PAL) <[no-reply@zenginehq.com](mailto:no-reply@zenginehq.com)>."

Then, **enter the six-digit verification code** that you received into the prompt on the online portal. **Click Next.** →

Welcome

To continue, verify code sent to ...

1 2 3 4 5 6

[Send new code?](#)

Next

Please note that the code expires 10 minutes after the email is sent.

If your code expires, click on "Send New Code?"

Once your email address has been verified, you will be taken to the Program Info page for EVAH. You will see you are logged in when your initials and Full name have replaced the "Log In" button and now you can **click Apply**, as the system is no longer in Preview Mode.

## CREATE YOUR PROPOSAL TEAM (ORGANIZATION) PROFILE

The screenshot shows a web page titled "No Organization Profile Associated". The text reads: "Your account is not associated with an organization. In order to continue with your application, click **Create New Organization** below." Below this text are three options, each crossed out with a red 'X':  
1. "Search by Organization Name" with a text input field.  
2. "Search by Organization EIN" with a text input field.  
3. "Are you a tax-exempt organization?" with a checkbox.  
Below these are two buttons: "Search Existing Profiles" and "Create Using GuideStar", both crossed out with a red 'X'. In the center, there is an "OR" separator. At the bottom, there is a large green-bordered button labeled "Create New Organization" with green arrows pointing towards it from both sides, and a smaller "Back" button below it.

When you **click Apply**, you will be told that there is "No Organization Profile Associated" with your account.

**\*\*\*DO NOT SEARCH\*\*\*  
by Organization Name,  
by Organization EIN,  
and DO NOT SEARCH  
EXISTING PROFILES!**

**DO NOT 'CREATE  
USING GUIDESTAR'!**

**\*\* ONLY CLICK ON  
CREATE NEW  
ORGANIZATION \*\*\***

### 1 ORGANIZATION PROFILE = 1 TEAM PROFILE for 1 PROPOSAL

When you click Create New Organization, WizeHive will prompt you to Create an Organization Profile. When filling out this section, **think of the Organization Profile as your Proposal Team Profile for this one Proposal submission.**

If you have any questions or would like support while you complete your WizeHive Team Profile, reach out to [application\\_help@povertyactionlab.org](mailto:application_help@povertyactionlab.org).

We understand that setting up this type of profile involves additional, non-intuitive steps, however, using WizeHive's Organization Profile will unlock features that will benefit applicants, including being able to **collaborate on a proposal with your team members**. Thank you for following our instructions with this new feature; [your feedback is encouraged and welcome!](#)

Complete all fields in the Proposal Team (Organization) Profile form.

### Create Your Organization Profile

Please [follow the instructions here](#) to fill in your Proposal Team Profile.  
When filling out this section, think of the Organization Profile as your Team Profile for this one proposal submission. Each team profile = one proposal.  
Using WizeHive's Organization Profile will unlock features that will benefit applicants, including being able to collaborate on a proposal with your team members.

Please reach out to [application\\_help@povertyactionlab.org](mailto:application_help@povertyactionlab.org) with any questions.

Team Profile Name\*

Please use your proposal name so that you can easily identify which team profile is associated with which proposal.

\*\*\*PROPOSAL NAME\*\*\*

Characters Remaining: 100

The applicant is the person who submits the proposal.

First Name\*

Last Name\*

Create Organization

**Team Profile Name = Proposal Name**

**Enter your proposal name as your Team Profile Name.** This is how you will identify this proposal in your list of applications.

**Applicant Name**

**Enter the name of the applicant** for this proposal team profile.

Note: Whoever creates your Proposal Team Profile will automatically be added as the **Profile Owner** and **Lead Applicant**. **\*Adding names only to this Profile will not enable that contact to edit/submit your application and receive emails. If you would like to reassign the Lead Applicant role, MAKE SURE TO [ADD THEM AS A LEAD APPLICANT](#) in your application to give them access.\***

← Click "Create Organization"

The next screen will be the application page with the option to [Start](#) each section. If your page is blank, try refreshing the page or click "Evidence for AI in Health (EVAH) initiative" in the blue left-side menu.

**You are ready to start your application!** Skip ahead to the sections on [Starting your Application](#) or learn how to [Add / Manage Collaborators](#).

## "CHOOSE YOUR ORGANIZATION" IS NOT YOUR ORGANIZATION NAME

Please keep in mind that, in WizeHive, your Proposal Team Profile is called "Organization Profile." **You should always select to Create New Organization for every new Proposal you are submitting.** There is not a limit on the number of Proposal Team Profiles you can create.  
*What happens if you select an already existing Proposal Team (Org) Profile?*

- If you apply to this RFP more than once, **you will receive an error that you have already submitted a proposal** to EVAH for that RFP. This is correct—you cannot submit the same proposal twice for the same RFP—go back and create a new Proposal Team Profile with your new/second proposal name.

Please keep in mind:

- **Full Title of Proposal is in the Application itself:** You will enter your “Full Title of Proposal” in your application. Therefore, the Proposal Team (Org) Profile Name is for identification in WizeHive purposes only; the proposal name you enter in your actual application is what will be reviewed.
- **You can EDIT your Proposal Team Profile:** Go to your name in the upper right of your screen → click the dropdown → select “Your Profiles.” Click on “Organization Profile” to access all of your Proposal Team Profiles; click Edit Profile, make your changes, and then Save. Reach out to [application\\_help@povertyactionlab.org](mailto:application_help@povertyactionlab.org) for assistance.

If WizeHive gives you the option to “Choose Your Organization”:

**\*\* ONLY CLICK ON  
CREATE NEW  
ORGANIZATION\*\***

The other options will lead to errors, either that you cannot submit or it will overwrite an already created Proposal Team Profile.

## Starting your Application

Before beginning your application, check the Initiative's RFP webpage for:

- **Proposal Guidelines** where you can preview questions and word count limits
- **Budget Templates:** Please note that the budget templates are formatted specifically for each application. Please do not remove the formatting, change any of the formatting, or create new columns in the template. You will upload your budget in the Budget section of the main application in WizeHive.

**Please note:** Text fields in WizeHive are Plain Text, and do not include any formatting functions (e.g. bold, underline, italics, bulleted lists and numbered lists). Please keep this in mind if you plan to copy and paste any pre-written responses into the WizeHive text fields.

After you create your Proposal Team (Organization) Profile, you will be taken to the application webpage. You can also click on “Evidence for AI in Health Application” under Intake in the left-side menu of your screen. If there is any issue, try refreshing your webpage.

### REMINDERS

At this time in WizeHive, **it is not possible to delete an application once it is started.**

Please note that **only those with the role of “Lead Applicant” can submit your Application.** See the [Add / Manage Collaborators](#) section for instructions and more information.

Once you are on the application page, **click the blue Start button** on the right side of the **Eligibility and Key Applicant Details** section to begin your application.

Evidence for AI in Health (Applicant Instructions (Team Profile Name Field))

Evidence for AI in Health Application

Review Submit

Eligibility and Key Applicant Details

Start



## Add / Manage Collaborators

Once you start your application, you can **add your team members to collaborate on your proposal and/or reassign the Lead Applicant role** (if needed). The Proposal Team (Organization) Profile creator is automatically added as a Lead Applicant to a proposal. All other team members need to be **invited and given a role**, either as Lead Applicant or Collaborator; these roles have different levels of permissions:

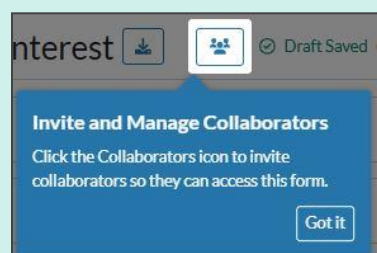
- **Lead Applicant(s)**: Full access to edit, and submit an application. Can invite more people and manage permissions. The lead applicant organization is expected to be the primary award recipient and accountable organization.
- **Collaborator(s)**: Can view and edit but cannot submit an application. Cannot invite more people or manage permissions.


You can add or manage collaborators at any time during the application process.

### Add / Manage Collaborators | Step-By-Step

At the top of your application page, **click on the multi-person icon to Add or Manage Collaborators**.

This will open up the Collaborators page, which lists all collaborators names, email addresses, roles, and their WiseHive account status: *active* = they have a WiseHive account; *invited* = they will be invited to [create an account](#).



First Name	Last Name	Email Address	Organization Profile
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Email Address"/>	<input type="text" value="Organization Profile"/>
Organization Role			
<input type="text" value="Select Role"/>		<input type="button" value="Invite"/>	
<a href="#">+ Add Collaborator</a>  <b>Click to add more team members</b>			

Enter each proposal team member's First Name, Last Name, Email Address, and select if they are a Lead Applicant/Collaborator. **Click Invite** to send them an email invitation that they will have to accept.

Email to active WiseHive users:

[Your Name] has added you as a collaborator on an application for [Evidence for AI in Health](#) on NextZen. Log in to the program portal:

[Log In](#)

Email inviting new user to WiseHive:

[Your Name] has invited you to contribute to an application for [Evidence for AI in Health](#) on NextZen. Click the button below to log in and accept your invitation to collaborate with [Proposal Team Profile] on NextZen.

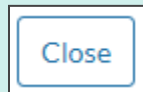
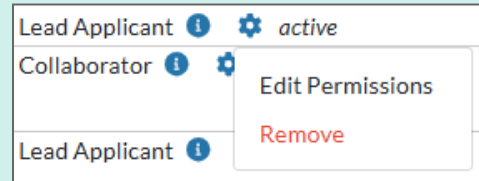
[Accept Invitation](#)



Once team members are added as Lead Applicants/Collaborators and they log in to/sign up for WizeHive, your team's proposal will be listed in their account under **Applications**. They can now access and edit the proposal. They will not need to Create a New Organization in their account.

**\*Note: Edits to a proposal in WizeHive will only show to other team members once they are saved. Please alert your team members so they are aware while editing the proposal in WizeHive.\*** They will also receive all auto-emails from WizeHive for this proposal going forward.

To edit the permissions or remove a team member, click on the Collaborator icon, then **click the blue gear in the same row as their name**. Click "Edit Permissions" to change their role or "Remove" to remove them from your proposal.



**Click Done** after your changes and to exit the page. Any permission and removal changes may take a few minutes to take effect.

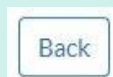
## Navigating the Application Sections

Once you have started working on an application section, the Start button will change to Edit. You can work on the sections in any order. **Click Edit** to reopen that section of your application, anytime before you submit. Below are a few tips on the navigation buttons and notifications to look for in WizeHive.

### NAVIGATING THE APPLICATION SECTIONS



When you have reached the end of a section, **click Next** in the bottom right of the page. Your work will be saved and you will be moved into the next section of your application.



If you want to return to the previous section, **click Back** in the bottom left of the page.



Click **Save Draft & Exit Section**, in the bottom center of the page to save your work and return to the main page of the application, where you will find the list of all application sections to either Start or Edit.

*At the bottom of the last section of the application, there is no Next or Submit button.*

**Click Save Draft & Exit Section to return to the main page of your application**, where you will find the buttons in the upper right of your screen to Review or Submit your application.



WizeHive auto-saves every 10 minutes. At the top of each page, the status of your application will either be **"You have unsaved changes"** or **"Draft Saved."** Your work will also save when you click "Next" or "Save Draft & Exit Section" at the bottom of the page.

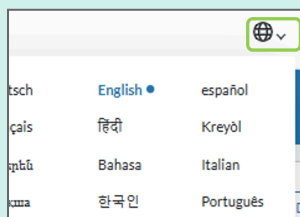


## NAVIGATING THE APPLICATION SECTIONS

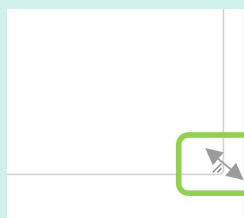
**Before you navigate away from the page, or click on any links within the application, make sure the status says "Draft Saved."** You can then leave and return to your draft to make changes before you submit it.

### 2. Project Details

**Missing required information.** If a section of the application has a red left border, that means there is a required field that is missing information. Click Edit to reopen that section and review. **NOTE:** If a single-select field is causing the "required" error; click on "Clear selection" on that field → Save Draft and Exit section → Return to that section and save your response. That should reset the field and remove a required error.



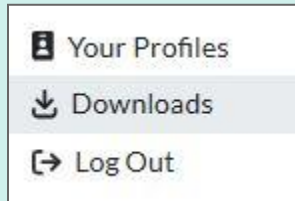
**Change the language** presented in the application portal. In the upper right of your webpage, to the left of your logged in name, select the circular icon with the dropdown arrow to open up the language options. Select a language preference from the twenty-one (21) languages offered. **Please note that all responses are required to be submitted in English.**



When answering long answer questions, you can **expand the size of the text box** by clicking and dragging the bottom-right corner.

Expanding the box makes it easier to view and edit longer responses.

### Downloads Page



#### To download a PDF of your Main Application



1. Click the **download icon** at the top of your page →
2. A popup notification will confirm your download and direct you to check your Downloads page
3. Click **Back to Main Menu**; then, go to your "Log In" name in upper-right, and click the dropdown to select Downloads.  
← This will take you to your Downloads page.

✓ Your download is generating, you can check that on the Downloads page.

← Back to Main Menu

No applications available.  
No results found in the list.

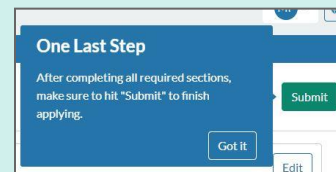
**Application temporarily unavailable.** In the very rare instance of a technical update, the application may be temporarily unavailable. Check **Applications** at the top of your screen. Please check back after 30-60 minutes or reach out to [application\\_help@povertyactionlab.org](mailto:application_help@povertyactionlab.org) for technical support.

## Submitting your Application

**Reminder: Only collaborators assigned to the role of LEAD APPLICANT can submit an application in WiseHive.** See [Add / Manage Collaborators](#) for instructions on how to add or edit someone's role.

### SUBMITTING YOUR MAIN APPLICATION | STEP-BY-STEP

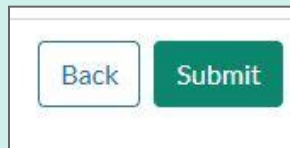
**One Last Step.** When all required sections of your application are completed, you will see a pop-up notification reminder to hit "Submit" to finish your application. Click "Got It" to acknowledge this step.



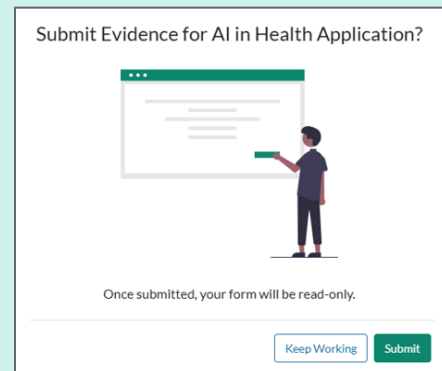
**Review your application.** Before submitting, you will have the chance to review all sections of your application. This is strongly recommended as your application will be read-only after submission.



**Submit your application.** When your review is complete, click the green Submit button, located at the bottom of the Review page.



There is one more confirmation pop-up before submitting. If you need additional review, click Keep Working. If you are ready to submit, **Click Submit again.** →

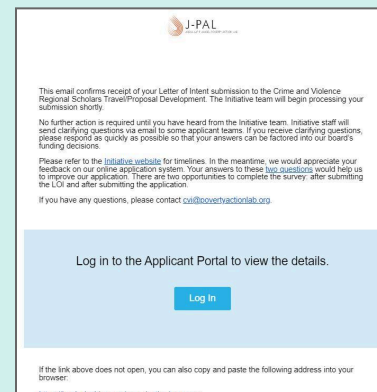


**Confirmation of Submission.** You will see confirmation of your submission in WiseHive and you, along with all collaborators you have added to the proposal will receive an email confirmation. If you do not receive an email confirmation, reach out to the Initiative team to confirm the successful receipt of your application.

**WiseHive Confirmation:**



**Email Confirmation:**



## Check the Status of Your Application

To check the status of your application, log in to WizeHive, using the link in your submission confirmation email. Click on **Applications** at the top of your page, then, you will see a list of all of your applications, the status of each application, and the action you can take:

The screenshot shows the J-PAL WizeHive interface. At the top, there's a navigation bar with 'Applications' highlighted. Below it, a search bar and a 'Filter' button are visible. The main table lists applications with columns: Opportunity(s), Application, Applicant, Cycle, Deadline, Status, Submitted, and Actions. A sample application is shown with a 'Draft' status and a 'Continue' button highlighted. A red warning message says 'Disregard! Check RFP materials for all deadlines'. A tooltip points to the 'Continue' button with the text 'Click to take this Action'.

### Application Status

### Action you can take

Draft

**Click Continue:** You can open and continue working on and editing your application until you submit it.

Submitted

**Click View:** Your application is in read-only mode. If you need to make edits to your submitted application before the due date, contact the Initiative team and request a revision, including which responses you need to edit.

Under Review

**Click View:** Your application is in read-only mode and under review by the Initiative team. If the Initiative team needs clarification or more information from you, they will contact you by email.

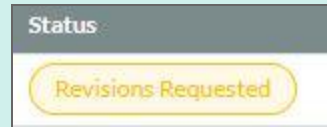
## Revise & Resubmit Requests

If you receive a Revise & Resubmit request, we kindly ask that you log in to WizeHive, respond to any requests, and resubmit in a timely manner.

### HOW TO RESPOND TO A REVISE & RESUBMIT REQUEST

**Notification:** The applicant email associated with the application will receive an email notification with the subject line "Revision Requested for Evidence for AI in Health" and the instructions to Log In to WizeHive. Once logged in, **go to Applications**.

On the Applications page, you will see the status of your application has changed from "Submitted" to "Revisions Requested." **Click on your application with the "Revisions Requested" status →**



Once the application is open, you will see the following notifications:

- At the top of your screen:
- Next to the "Evidence for AI in Health Application" heading:
- Any section that includes a revision request will have a gold left border. **Click Edit to open each section with a gold left border** to locate and address each revision requested.

 Requested revisions are highlighted below. Please address and resubmit.

You have pending revisions.

2. Project Details

A screenshot of the "Funding Amount\*" section. It shows a text input field with a dollar sign icon and the number "0". Below it is a yellow-outlined box labeled "Requested Revisions:" containing the text "Please enter a funding amount." At the bottom is a text area with the placeholder "Add an optional comment to address the revision request." and a small edit icon. Two yellow arrows point to the input field and the comment area with red text annotations: "The response field can now be edited" and "Add any comments here".

Scroll through the section to any field(s) now marked with a gold-outlined "Requested Revisions:" box. This text box is where you will find the questions and comments from the Initiative team.

**Edit the field(s) directly and add comments (optional) to further address the revision request.**

Please note you can only edit the fields where a revision has been requested by the Initiative team.

Once the revision requests have been resolved, **go to the section menu page and click "Re-Submit."** You can re-submit without making revisions, so make sure to review your application again before re-submitting.



**Note:** When you or one of your proposal collaborators resolves a revision request in WizeHive, it will save the revised version and the gold-outlined revision request box will disappear. It is advisable to communicate with your team on who will be making any revisions.

WizeHive may not always be able to accommodate the clarifying questions or requests from the Initiative team, in which case, the team will email you directly. Thank you for your understanding and flexibility to respond to revise and resubmit requests in WizeHive and over email. Please feel free to reach out to the Initiative team with any questions throughout your application process.

## Feedback Form

WizeHive is a new system. While our staff have tested it extensively, we welcome and encourage any feedback on these instructions or the system generally. Please provide such feedback (anonymously) [in this brief form](#) or send an email to [git@povertyactionlab.org](mailto:git@povertyactionlab.org).

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## Applicant/Portal User FAQs

This section will cover common situations that you may encounter when submitting your application or interacting with the WizeHive portal.

### General Troubleshooting Steps

In most cases, the steps below will resolve your issue and should be tried before you reach out to the initiative team or WizeHive Support.

- **Make sure you have a stable internet connection**
- **Try clearing the browser's history/cache.** If you've received this error before, coming back to re-enter the same information may cause the system to bring up the same message.
- **Use a different browser.** We generally recommend using the most up to date version of either Google Chrome or Mozilla Firefox. If you aren't using one of these, please do. If you are using, for example, Chrome, please try switching to Firefox or vice versa.
- **Try logging in/creating the account using Incognito or Private browsing mode.** Browsing in a private mode will allow you to log in without having your previous cache in the session.
- **Avoiding "Auto-Fill" browser features by manually typing in your username and password.** The autofill feature of a browser like Google Chrome can cause issues when trying to log in. This information could be outdated, incorrect, or the feature could just be causing issues in general in combination with the user's personal computer.
- Lastly, **please try restarting your device.** If you are using a desktop/laptop please try restarting your system and logging back into the portal. If you are using a mobile/tablet device, we highly recommend using a laptop/desktop device to access the portals/applications.

### Password Reset Issues

*I haven't received a password reset email and it's been over 10/15/20 minutes.*

- Make sure you are requesting the correct email address when submitting the password reset request.
- Check the URL of the portal you are currently attempting to access. Look back to any instructions sent to you by the organization.
- Check your spam folder and make sure to whitelist [@webportalapp.com](mailto:@webportalapp.com)

- If you are still having trouble, reach out to the organization to confirm you have an active application.

## **Not Receiving Emails**

*If you expected to but have not received an email from an organization using Zengine.*

- Being patient and waiting typically resolves email delays.
- Check the [Submittable status page](#) for any reported delays
- Check your spam folder and make sure to whitelist @zenginehq.com, @webportalapp.com (for portal “forgot password” resets), and no-reply@email.zenginehq.com (for auto-emails)
- Reach out to the [application help@povertyactionlab.org](#). There may be a configuration error preventing emails from being sent properly.