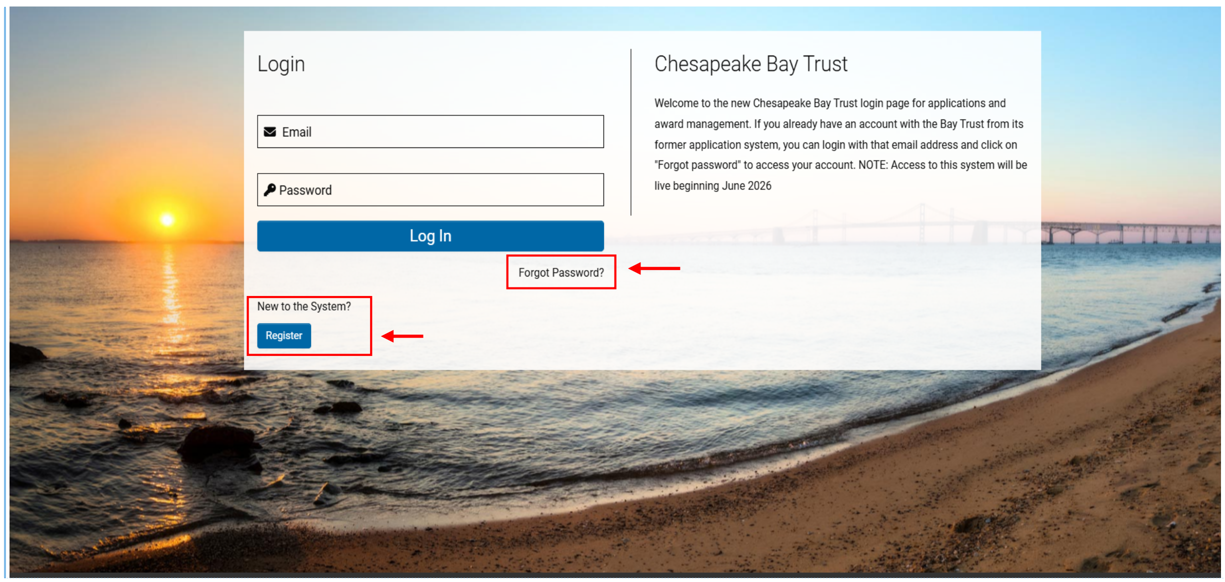
SmartSimple User Guide

Part I: Getting Started

Registration and Logging In

To register and/or login to the system, use the following link: https://chesapeakebaytrust.us-1.smartsimple.com/s_Login.jsp This link will take you the landing page pictured below.

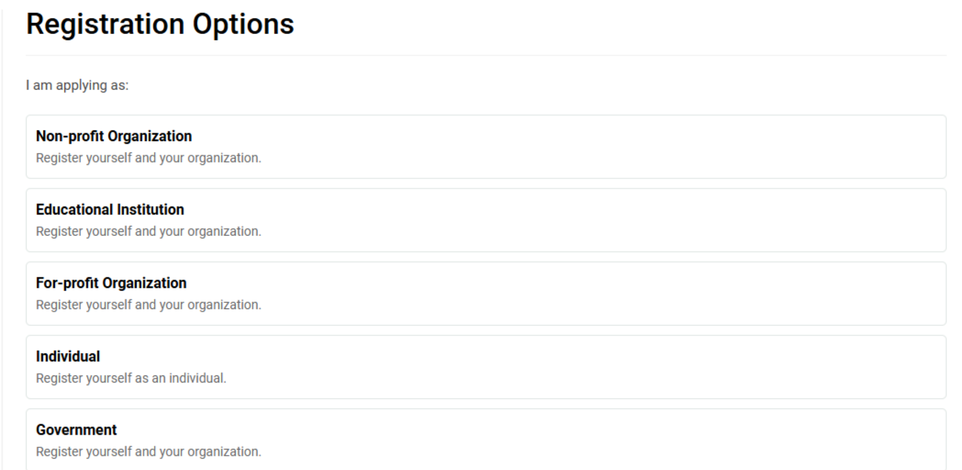


Commented [AT1]: Picture will need to be updated when this page is completed.

If you or your organization had an existing account in our previous system, Blackbaud Grantmaking, those accounts will have transferred over to SmartSimple automatically. To log into that account, click on “Forgot Password?” below the login button. Enter the email address you used to apply to or manage awards in Blackbaud Grantmaking and click submit. Within ten minutes, a reset password link will be sent to the email you entered. Make sure to check your spam and junk folders if you do not see it. Click the link provided in that email and create a new password, then use that password and email to login to the system.

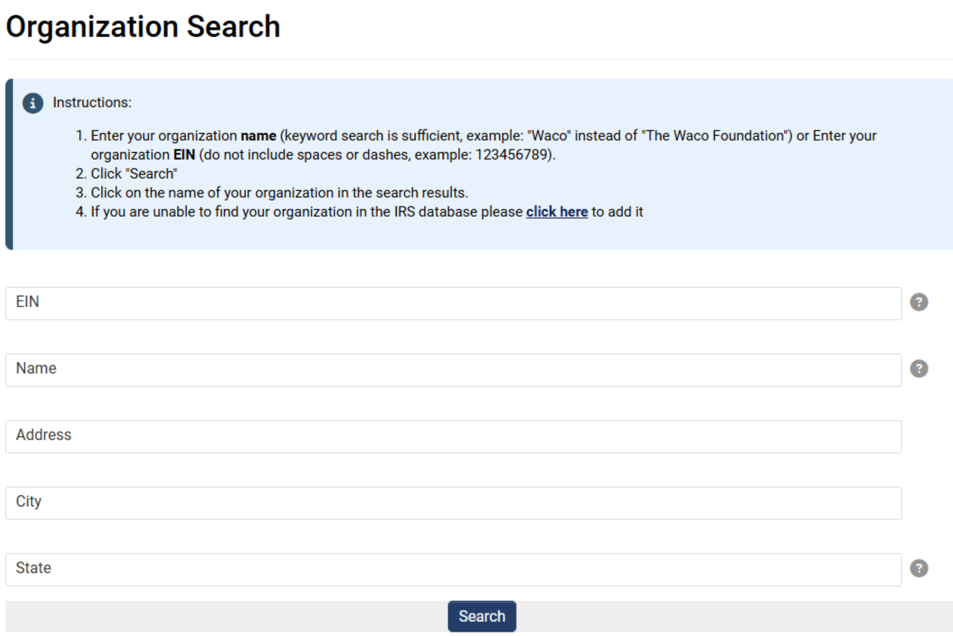
Registering as a First-Time User

If you did not have an account in Blackbaud Grantmaking, click the blue “Register” button in the bottom left to create a new account. Once you click Register, you will be prompted to select what entity you are applying as. Choose the option that pertains to you. For example: if you are applying for a rebate, select **Individual**. If you are applying for a grant on behalf of a non-profit, select **Non-profit Organization**.



Registering Your Organization

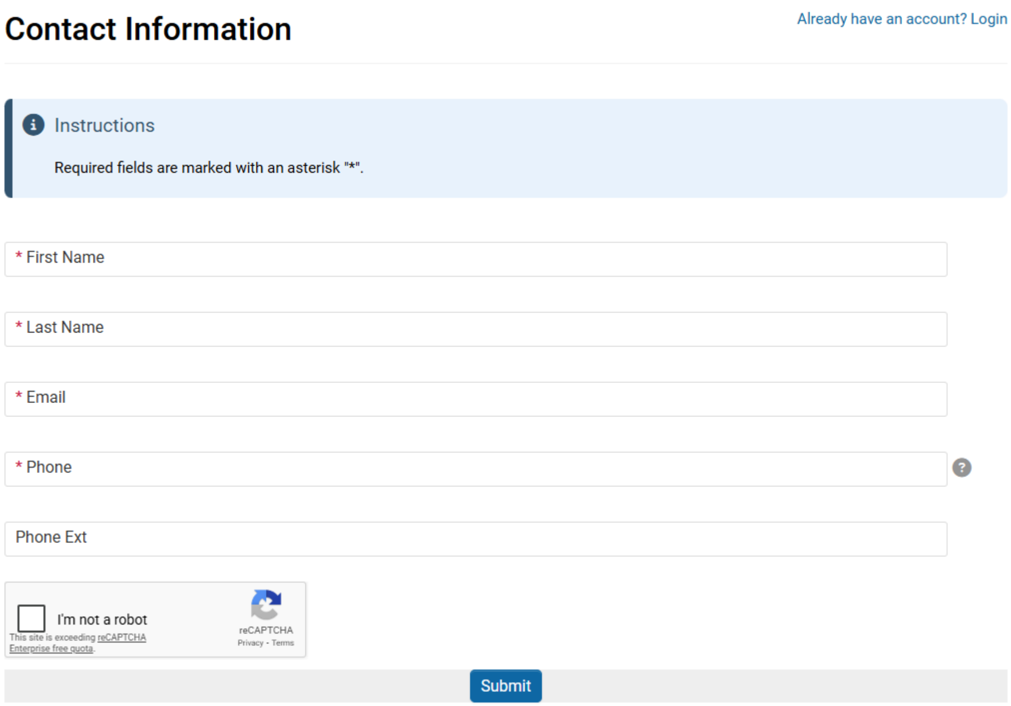
If you select any of the organization or institution options, you will first be prompted to search for your organization. Follow the instructions below.



Once you've searched for and selected your organization, fill in any remaining blanks in the Organization Information section. If your organizational contact does not populate after searching, you can search the IRS database as indicated. If your organizational bank account does not match your organizational name, please reach out to Trust staff for more detailed instructions.

Registering as an Individual

This is the last step of registration if you are registering on behalf of an organization, and the only step if you are registering as an individual. You will be prompted to enter your full name and contract information. Enter this, complete the CAPTCHA and click submit.



Contact Information

Already have an account? Login

Instructions

Required fields are marked with an asterisk "*".

* First Name

* Last Name

* Email

* Phone

Phone Ext

I'm not a robot

This site is exceeding reCAPTCHA Enterprise free quota.

reCAPTCHA

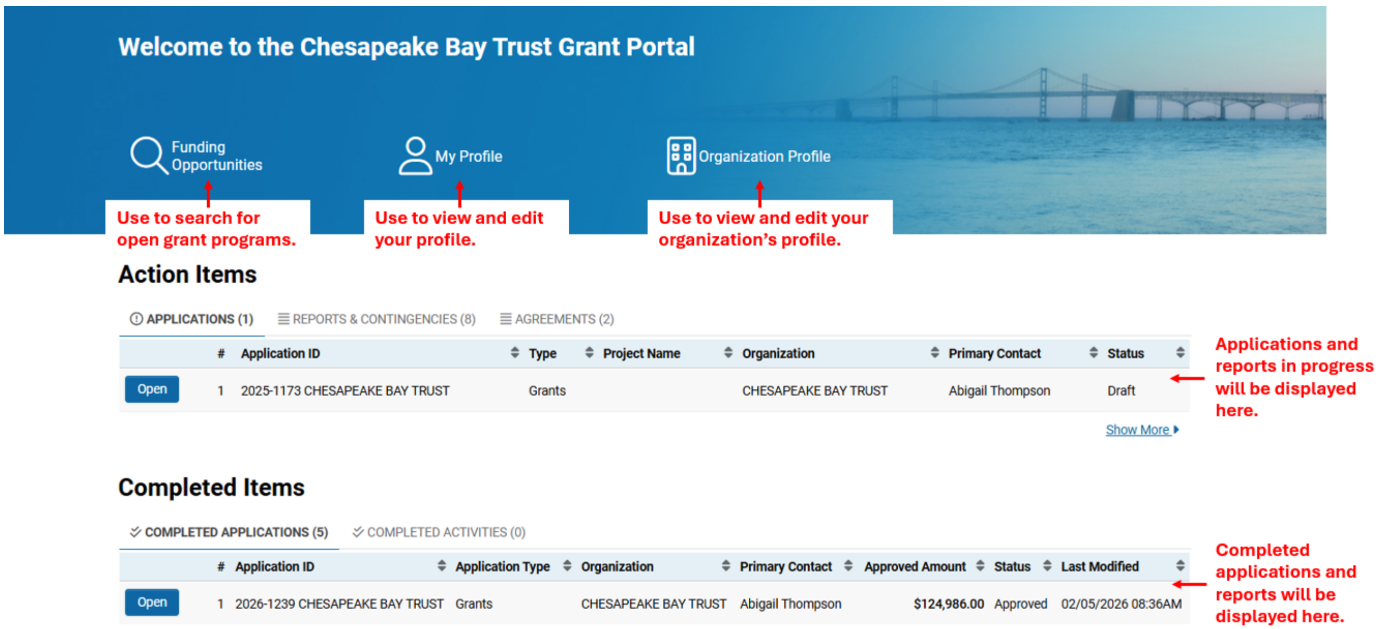
Privacy - Terms

Submit

Within 5 minutes, an email with the subject "Welcome: Chesapeake Bay Trust User Information" will be sent to your provided email address. Use the **first link** in the email to create a password for your account. You can then return to the login landing page and use your email address and newly created password to login to the system.

Getting Started with SmartSimple

After you've logged into the system for the first time, you will see the following landing page.



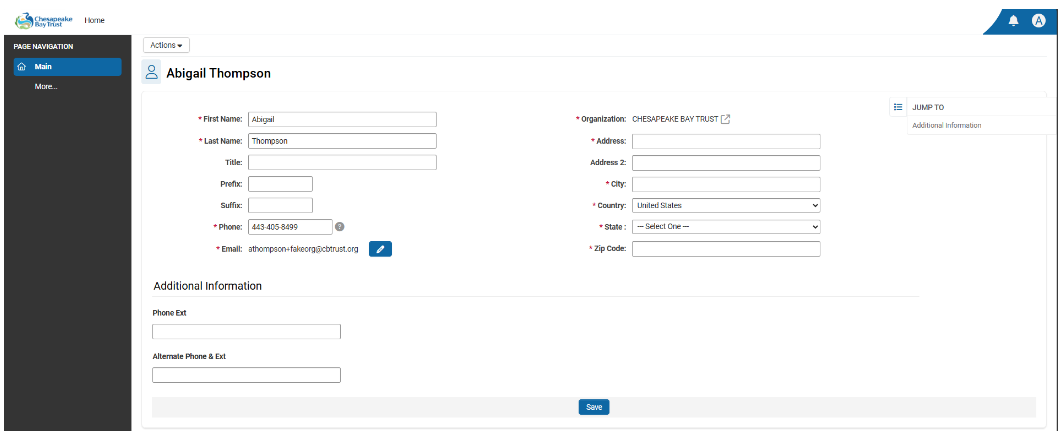
You can use the buttons in the top module to search for funding opportunities and view and edit both your profile and your organization’s profile. There are also dashboards that track your applications and reports in progress, as well as those that have been completed.

Before you start exploring the site, please check your profile and your organization’s profile to make sure that all information has been entered correctly.

Setting Up Your Profile

Select the *My Profile* button to view and edit your profile. Most of your basic information will have imported from registration, but you will have the option to add additional information such as your title, alternate phone numbers, and address (please note that this will only be available if you registered as an individual).

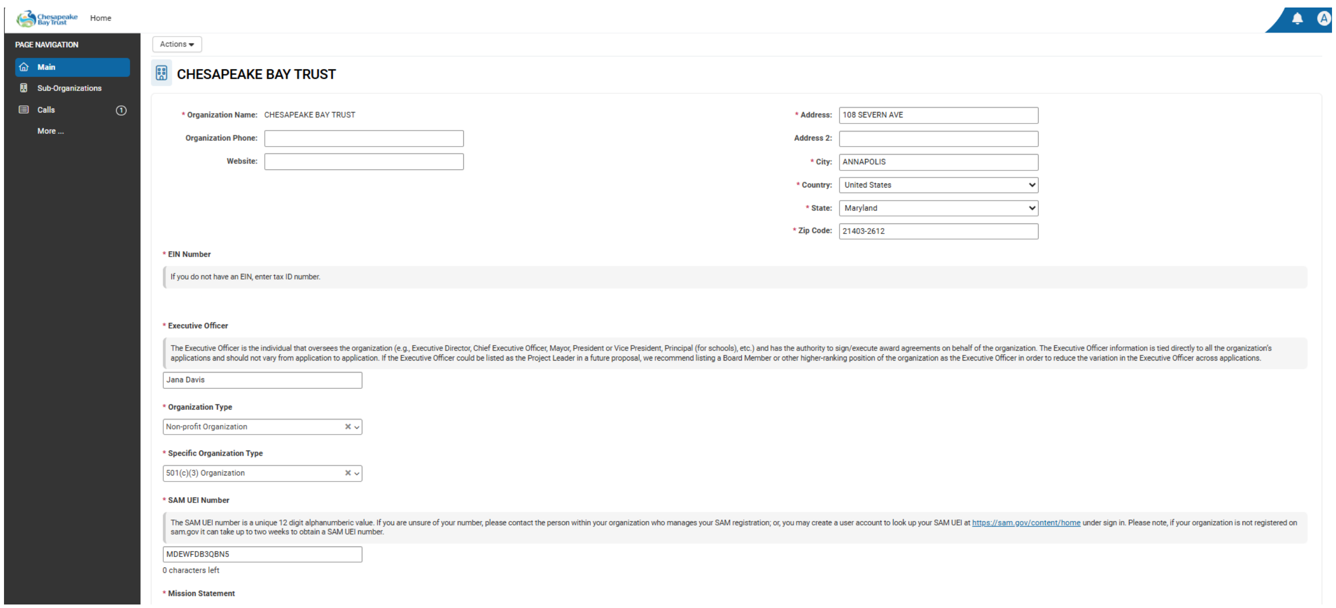
Required fields are marked with a red asterisk. Make sure that all required fields have been filled out before proceeding.



If you ever need to update any of your personal information, you can do so here.

Setting Up Your Organization's Profile

Select the *Organization Profile* button to view and edit your organization's profile. As with your individual profile, most information will have imported from registration, but you will be able to add additional information as well.



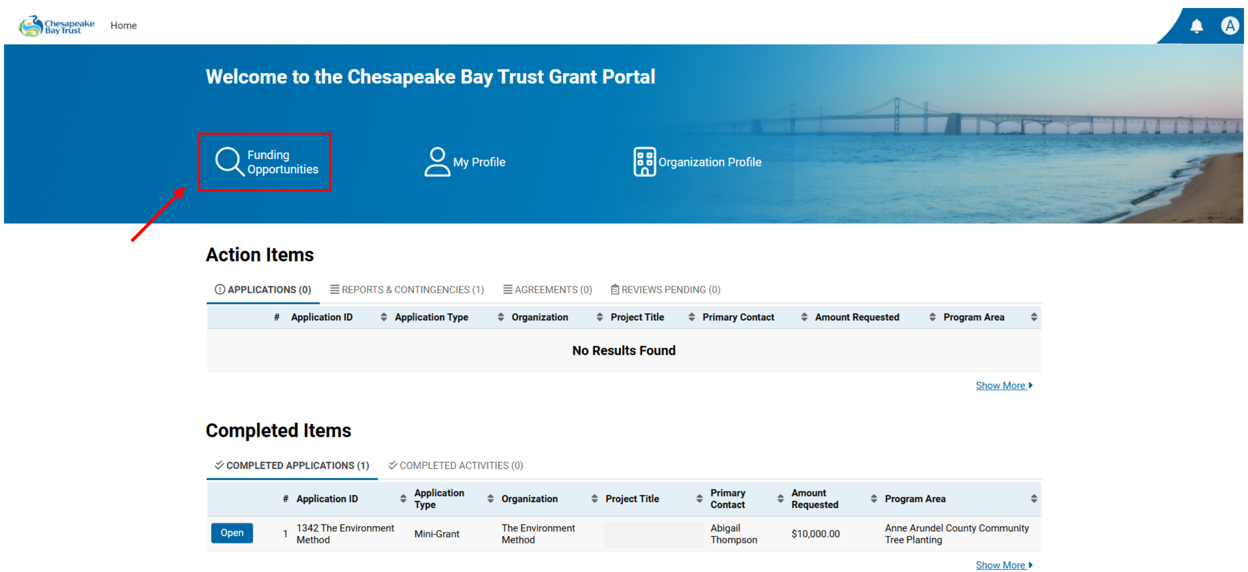
If you want to make additional edits later, click "*save*" and then select *"Home"* in the upper left corner to return to the landing page. Please note that all required fields must be filled out in order to successfully save.

SmartSimple User Guide

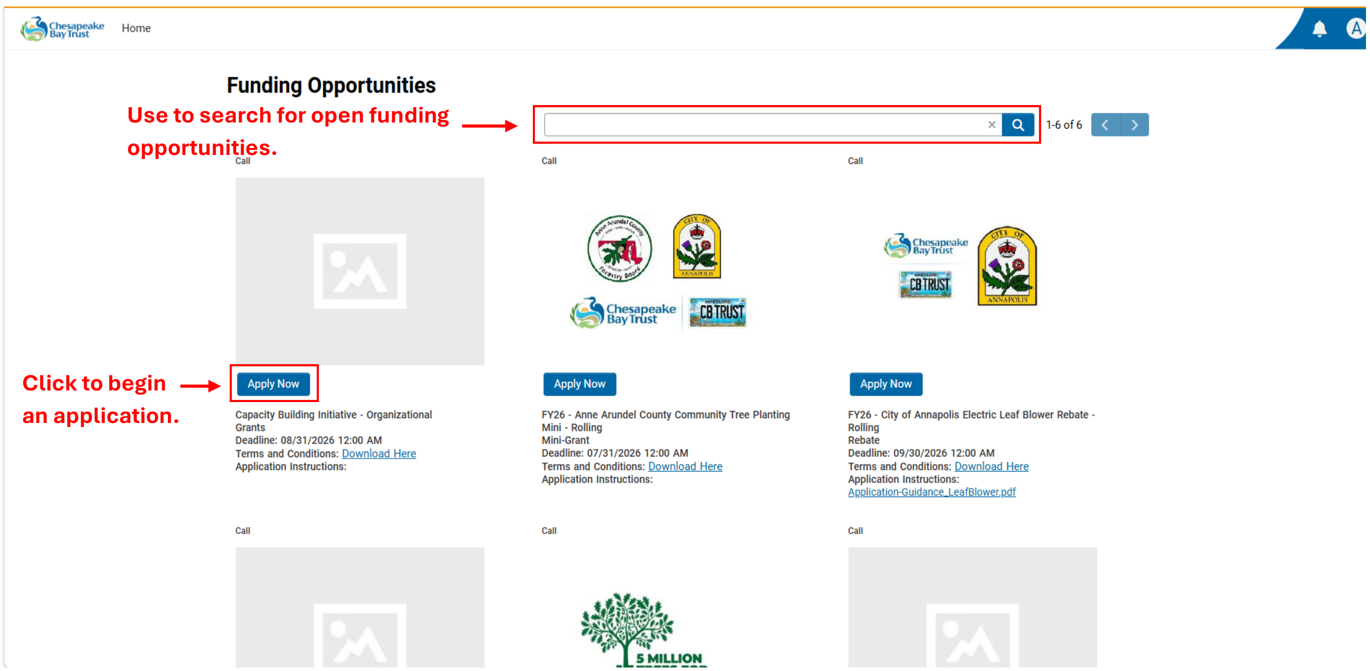
Part II: Submitting an Application

Viewing Funding Opportunities

Login to SmartSimple. On the home page, select “Funding Opportunities”.

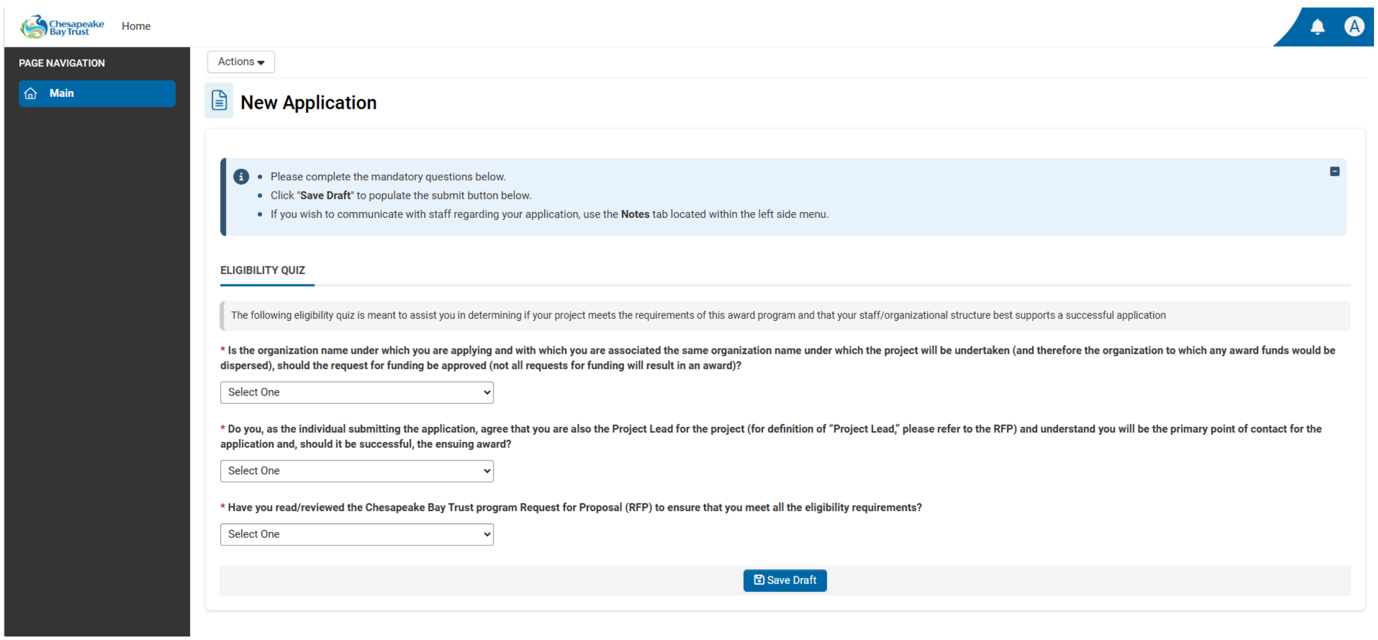


You will then be brought to a page that shows all open calls for applications. If you are looking for a specific program, you can use the bar in the top right to search for it. Otherwise, you can browse through the open calls; each one will show you the title of the grant program, type of program, deadline for submission, and a link to download the terms and conditions. When you've located the program you'd like to apply for, click the blue "Apply Now" button underneath the call.

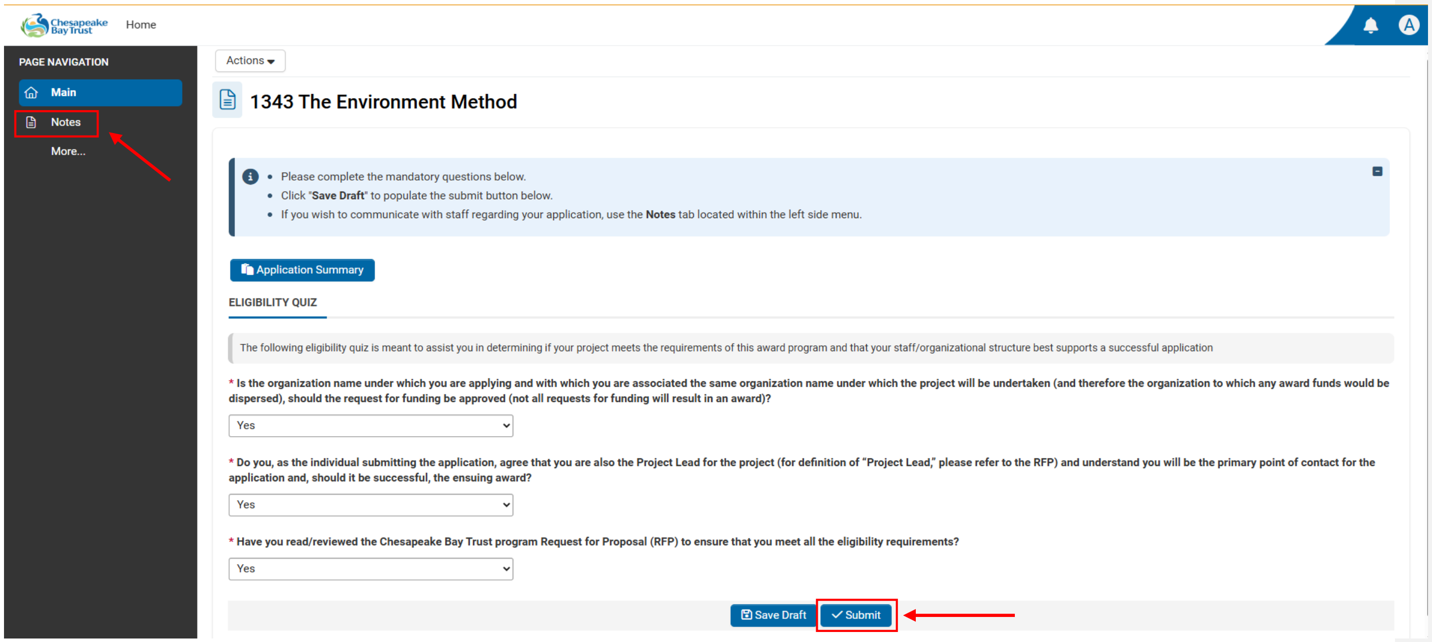


Starting your Application

When you begin a new application, you will first be prompted to complete an eligibility quiz. This will confirm if you (or your organization) meet the minimum requirements of the award program you are applying to. After you've answered all of the questions, click "Save Draft".

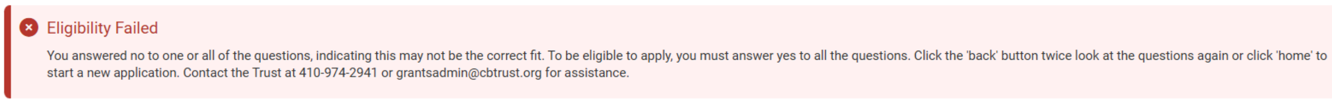


Once you've saved, two new fields will appear: "Submit" on the bottom bar and "Notes" on the side bar.



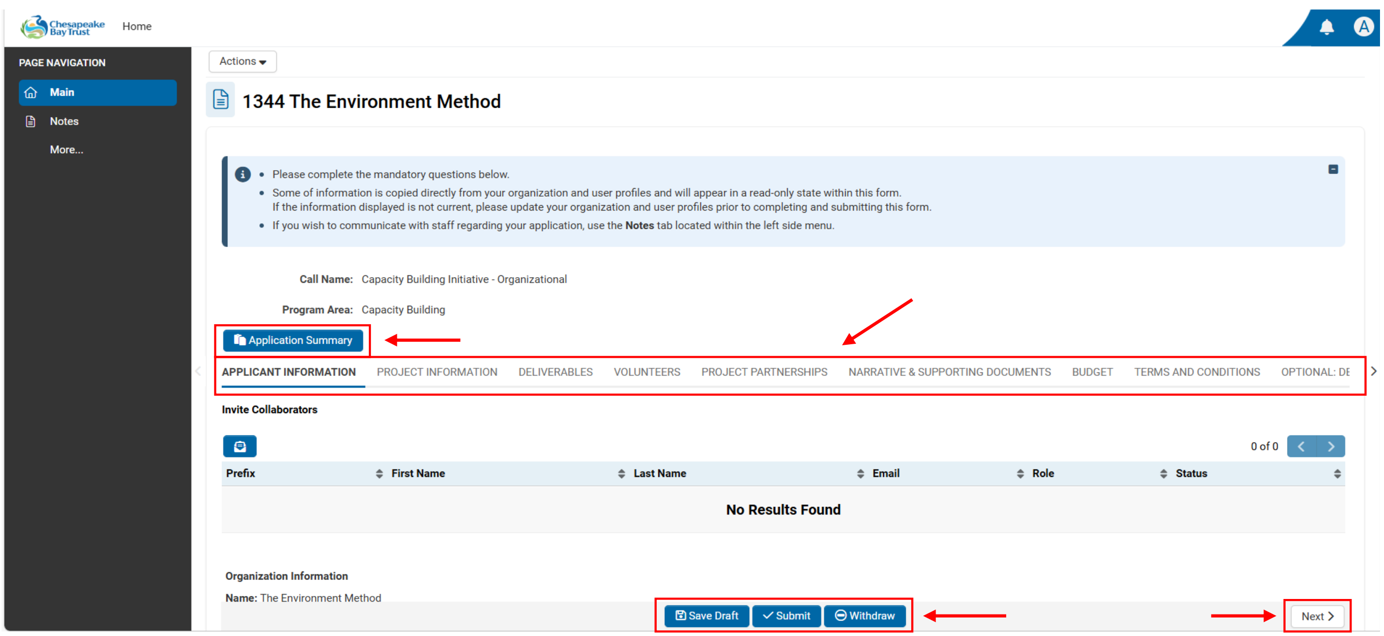
If you have an issue with the SmartSimple system at any time during your application, you can add a note in the "Notes" section on the left side bar. Trust staff will be alerted when you submit a note and can help to troubleshoot the issue. The Notes feature should only be used for system-related issues and questions. Any programmatic questions should be directed to the staff contact listed on the RFP of the call you are applying to.

When you've completed the eligibility quiz, click "Submit". If your answers indicate that you are not eligible for the funding opportunity, you will see the following message:



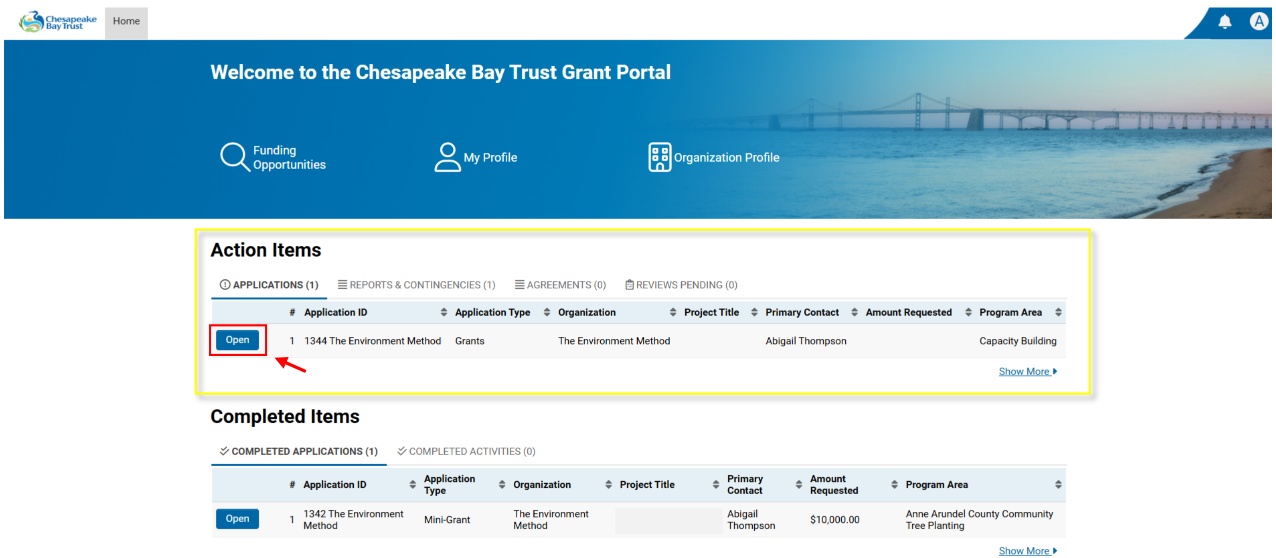
If you receive this message but believe you should be eligible for the program, please go back and review the RFP. If you still have questions, contact the staff lead for the RFP.

If you pass the eligibility quiz successfully, you will be able to move forward with the rest of your application.



You can use the tab in the center of the screen or the “Next” and “Back” buttons to navigate between different sections of your application. At any time, you can use the “Save Draft” button at the bottom of the screen to save your progress. This will allow you to pick back up where you left off if you leave the application portal (please note: the application portal does not auto-save. Be sure to save frequently to avoid losing any of your progress). You can also use the “Application Summary” button above the central tabs to download a PDF of your application. If you’d like to delete your application for any reason, you can do using the “Withdraw” button.

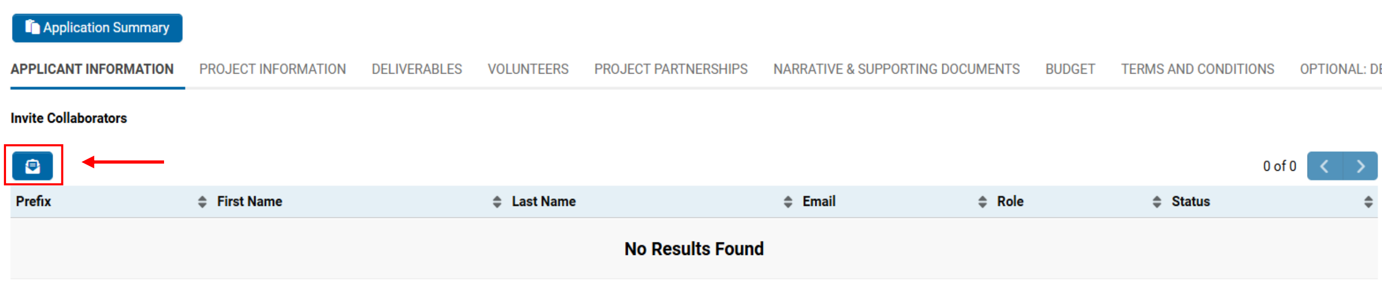
After you’ve saved your application for the first time, you will be able to access it from the Home page. All applications in progress will be listed in the Action Items section. Click the “Open” button to return to your application and continue making edits.

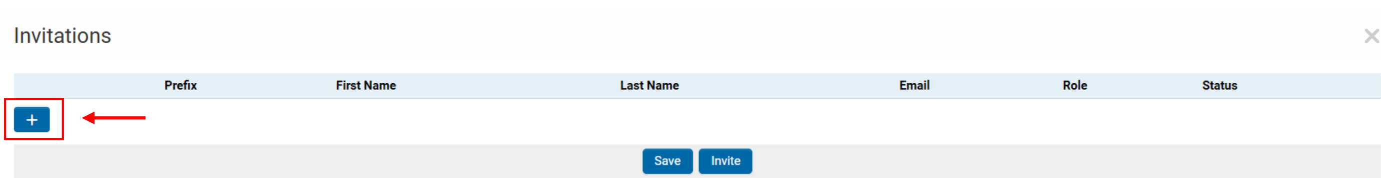


Applicant Information

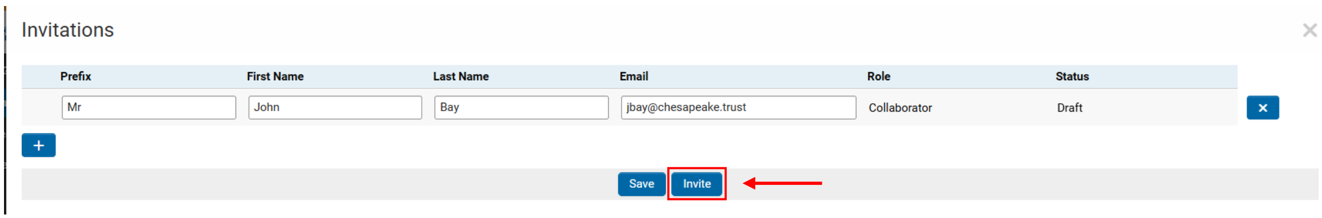
Some information on your application – for example, organization and primary contact information -- will auto-generate based on your organization and individual profiles. To change this information, you will have to return to the Home page and enter the “My Profile” or “Organization Profile” portals. Make sure to save first!

If you’d like to add a collaborator to your application, you can do so in the Application Information section. Select the envelope icon underneath “Invite Collaborators”, then click the plus icon in the resulting pop-up to add in the information of the person you’d like to invite.

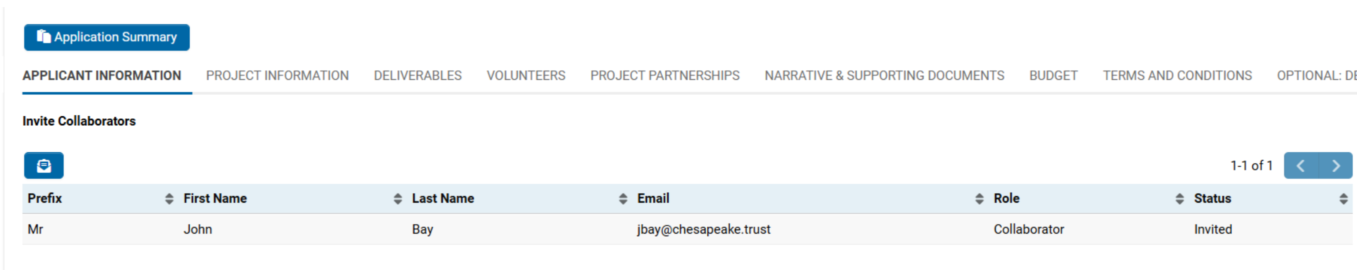




Once you've finished adding collaborators, click "Invite". This will automatically send an email to the listed individuals, inviting them to collaborate on the application. If they accept the invitation, they will receive another email inviting them to login to the system, or create an account if they have not already done so.



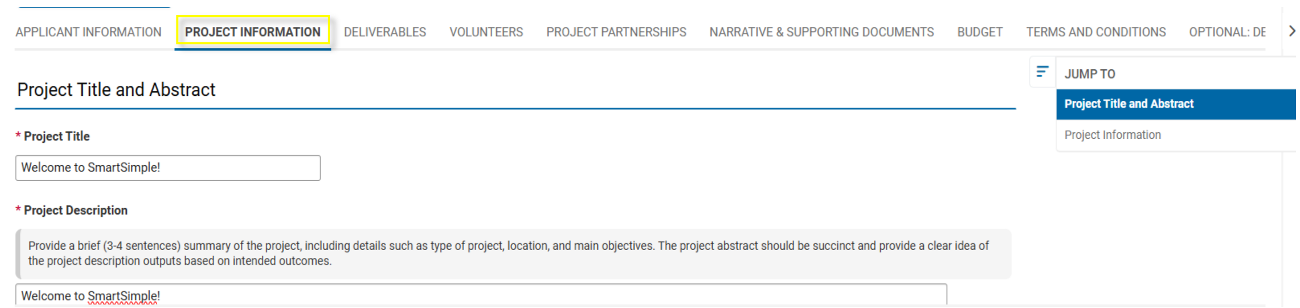
You should now be able to see the name, contact information, role, and status of your collaborators on the Applicant Information section.



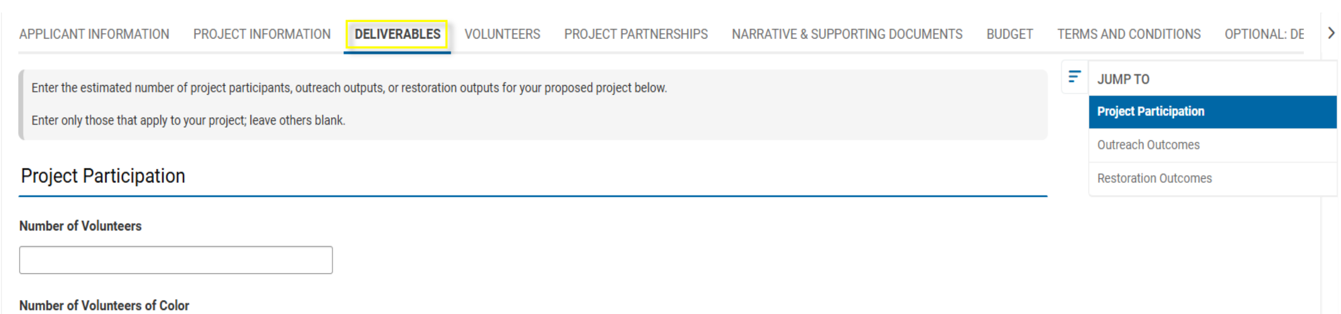
Filling Out Your Application

After verifying your applicant and organization information, you can proceed to work through the remaining sections. Each application will contain the following sections:

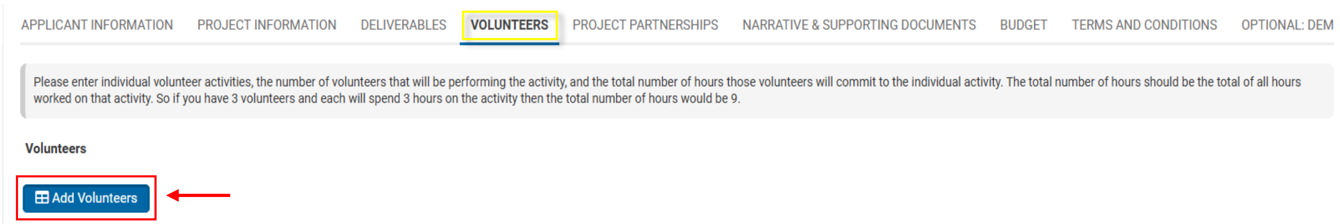
Project Information: use this tab to provide a basic, high-level summary of your project's details, such as what you plan to accomplish, what the timeframe is, and where the project will take place.



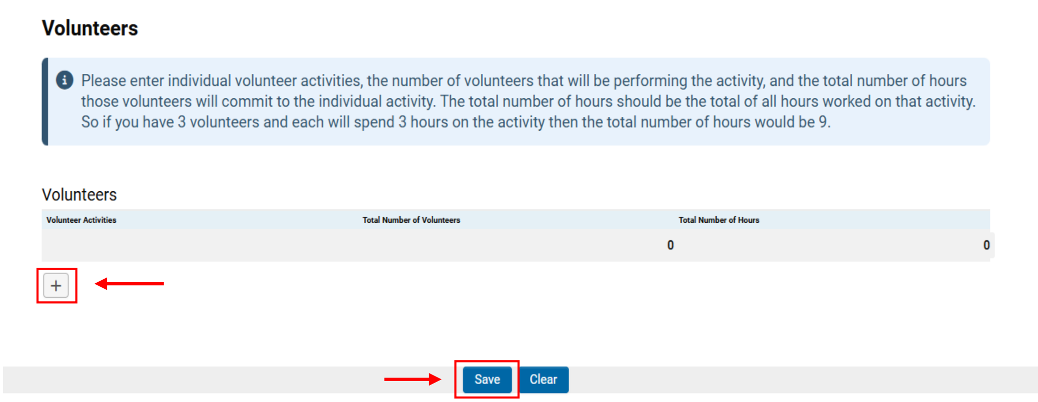
Deliverables: if awarded, these metrics will be tracked throughout your project term as an evaluation tool. In addition, the Trust uses these metrics in our annual report as well as reports sent to our partners and local legislators to show the impact of awarded projects. Not all deliverables will be relevant to your project. If a deliverable does not apply to your project, you can leave it blank.



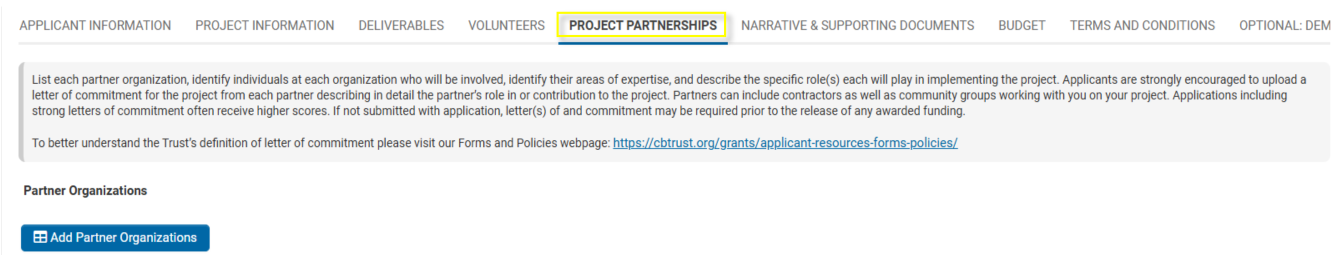
Volunteers: if applicable to your project, provide a description of volunteer activities, total number involved, and total number of hours each volunteer committed to your project.



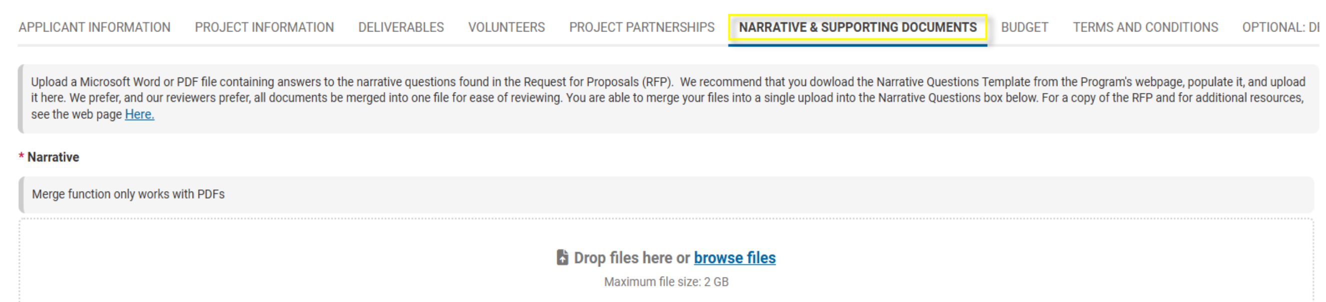
Volunteer information is added through a table, which can be opened by clicking the blue "Add Volunteers" button. Once you've opened the table, click the plus sign button to add a new line. When you're finished adding volunteers, click the "Save" button before exiting the table.



Partnerships: Provide a list of partner organizations, individuals, there area of expertise, and their roles in your project. Applicants are highly encouraged to provide letters of commitment for partner organizations outlining the partners' roles. As with volunteers, partner information can be added by clicking the blue "Add Partner Organizations" button and entering information into the resulting table.

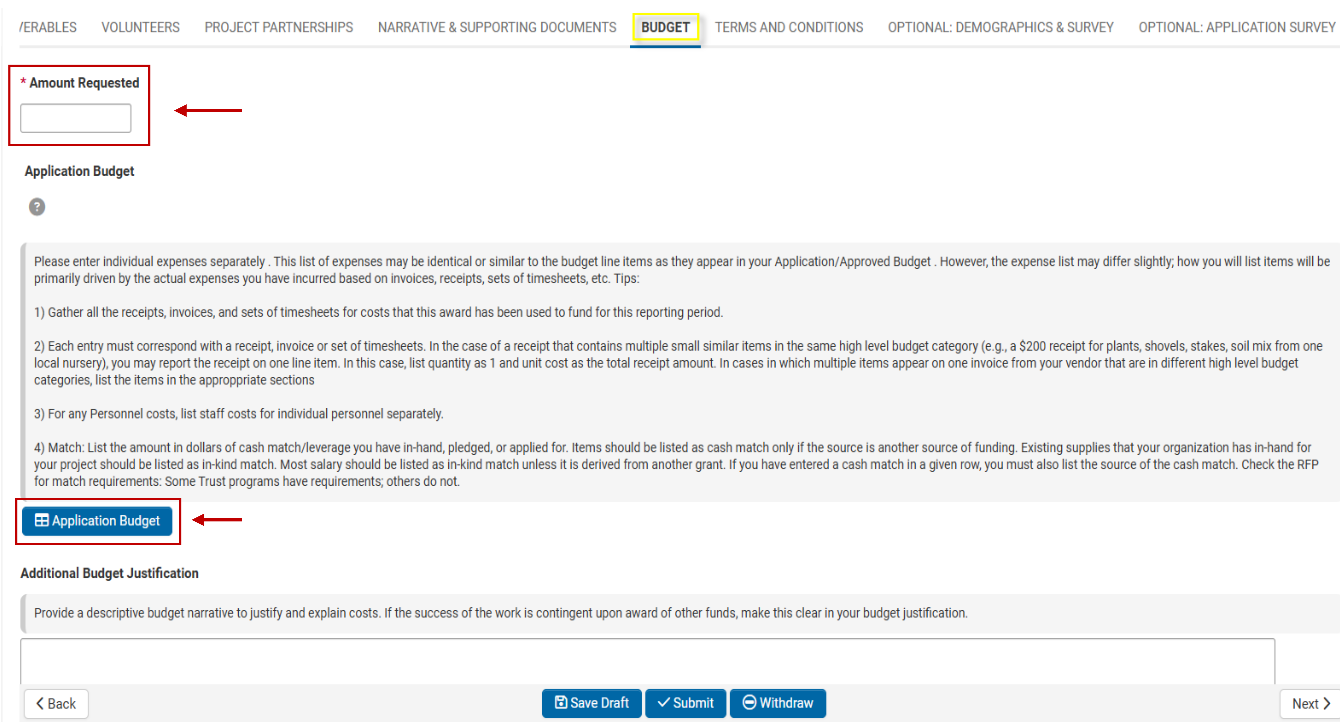


Narrative and Supporting Documents: Answer the narrative questions as completely as possible and upload any additional required documents as described in the RFP.

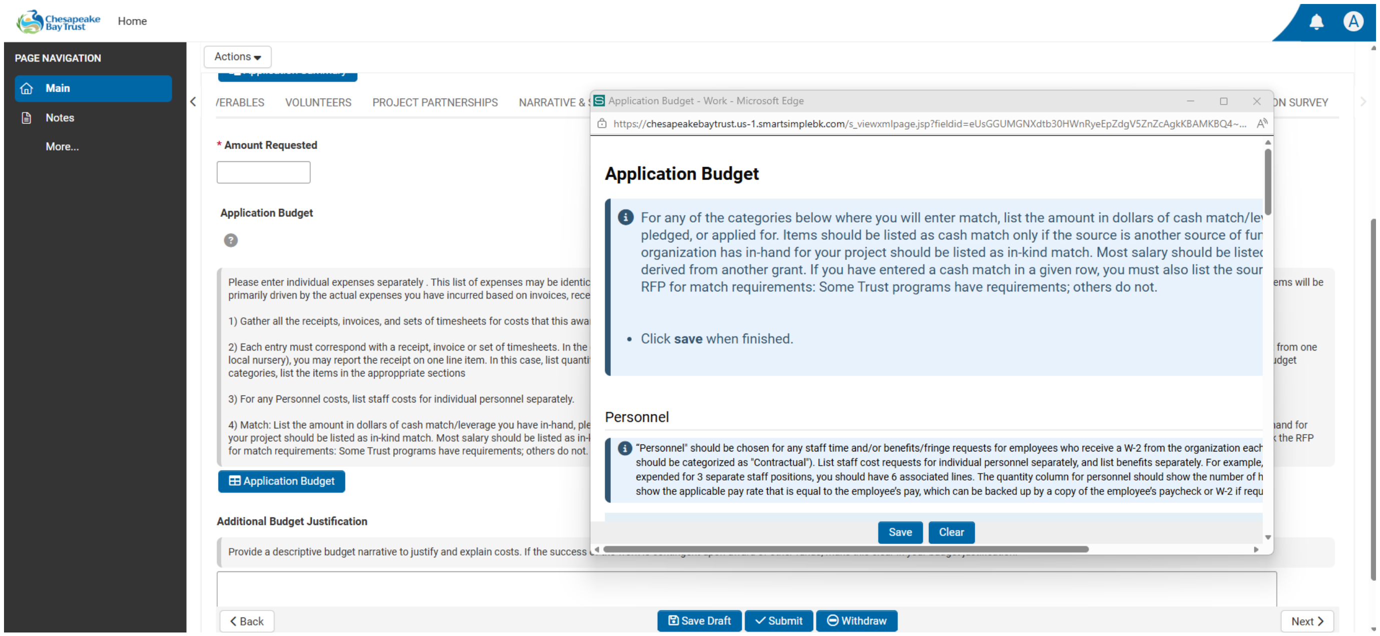


Filling Out Your Budget

The next tab is your project budget. First, fill out the “Amount Requested” field with the total amount of funds you are requesting for your award. Then click the blue “Application Budget” button to open the budget module.



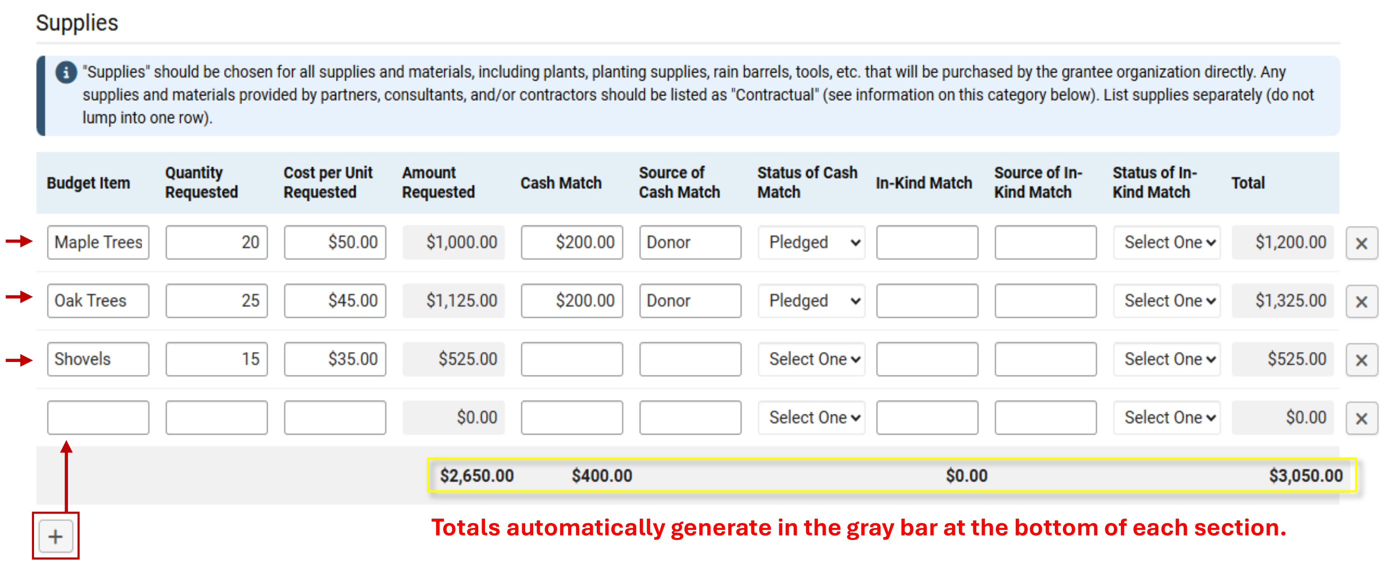
This will open a pop-up that shows the details of the budget and should match the total grant amount requested.



Each expenses should be sorted into one of six categories: personnel, supplies, contractual, travel, equipment, and other. If you are requesting indirect, there is a separate category for this as well. Descriptions of what items go in which category are written at the top of each section, and can also be found in our help documents on our website.

When filling out your budget, you will need to record each expense you expect to charge to your grant. Try to be as specific as possible – for example, plants should be broken down by species, personnel hours should be broken down employee, etc.

To add a new budget line in an expense category, click the plus sign under the category that item belongs to. Then add the title of the budget item, quantity requested, and cost per unit. Totals will be calculated automatically.



Supplies

"Supplies" should be chosen for all supplies and materials, including plants, planting supplies, rain barrels, tools, etc. that will be purchased by the grantee organization directly. Any supplies and materials provided by partners, consultants, and/or contractors should be listed as "Contractual" (see information on this category below). List supplies separately (do not lump into one row).

Budget Item	Quantity Requested	Cost per Unit Requested	Amount Requested	Cash Match	Source of Cash Match	Status of Cash Match	In-Kind Match	Source of In-Kind Match	Status of In-Kind Match	Total
Maple Trees	20	$50.00	$1,000.00	$200.00	Donor	Pledged			Select One	$1,200.00
Oak Trees	25	$45.00	$1,125.00	$200.00	Donor	Pledged			Select One	$1,325.00
Shovels	15	$35.00	$525.00			Select One			Select One	$525.00
			$0.00			Select One			Select One	$0.00
			$2,650.00	$400.00			$0.00			$3,050.00

Totals automatically generate in the gray bar at the bottom of each section.

If you have a cash match or in-kind match, you can also include that information in the budget module.

All budget information will generate in the summary table at the bottom. Make sure that the final Amount Requested total matches the Amount Requested you entered on the budget tab. If you're not sure of the exact amount you'd like to request, you can complete that field after filling out your budget.

Once you've finished your budget, click the blue "Save" button on the bottom before exiting the tab. The budget module does not save automatically. If you'd like to start over, click the "Clear" button. This will delete all data from your budget.

Total

	Amount Requested	Percent Indirect	Cash Match	In-Kind Match	Total
Total Personnel	$7,700	0.00%	$0	$0	$7,700
Total Supplies	$2,950	0.00%	$400	0	$3,350
Total Contractual	$5,000	0.00%	0	$5,000	$10,000
Total Travel	$65	0.00%	0	0	$65
Total Field Trip Fees	$0	0.00%	$0	$0	$0
Total Equipment	0	0.00%	0	0	0
Total Other	0	0.00%	0	0	0
Total Direct Costs	$15,715	0.00%	$400	$5,000	$21,115
Total Indirect Costs	$1,500	9.55%	$0	$0	$1,500
Overall Total	$17,215	0.00%	$400	$5,000	$22,615

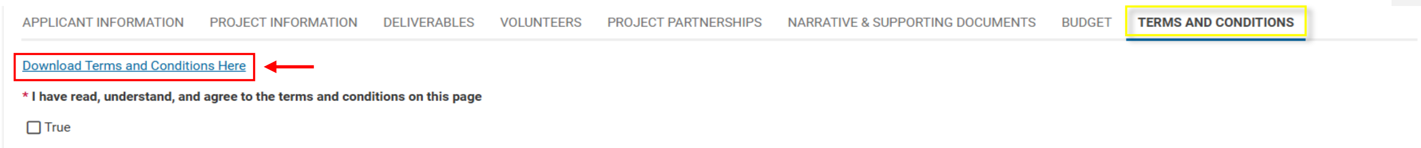
This number should match the number entered in the Amount Requested field on the budget tab.

Save Clear

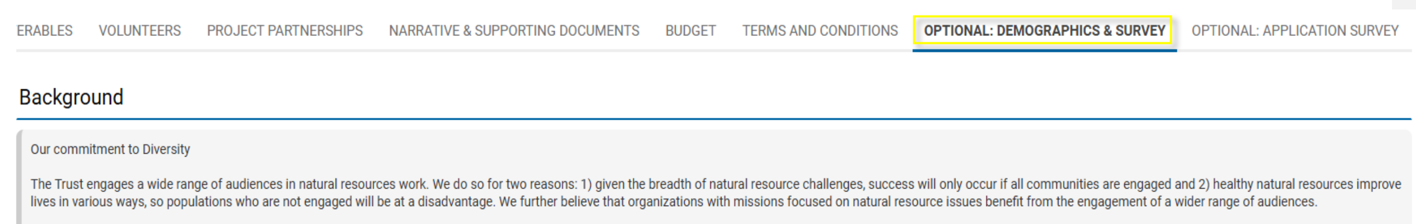
After saving, use the additional justification box to further explain any budget items if necessary.

Completing Your Application

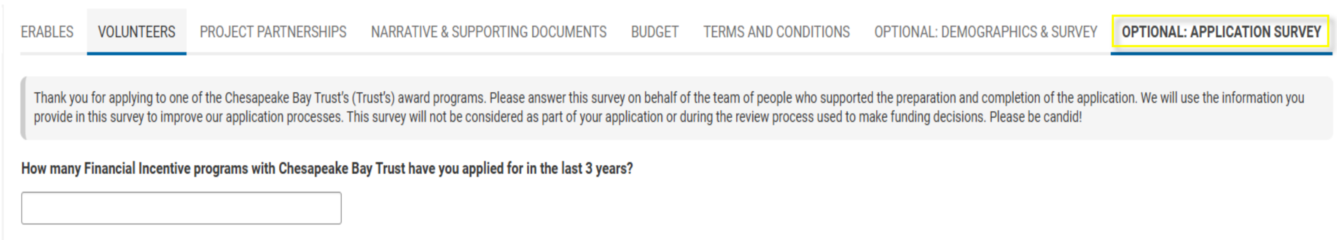
After the budget tab, you will see the Terms and Conditions which will apply if your application is successful and an award is made to your organization. Click the blue link, titled "Download Terms and Conditions Here", to view these.



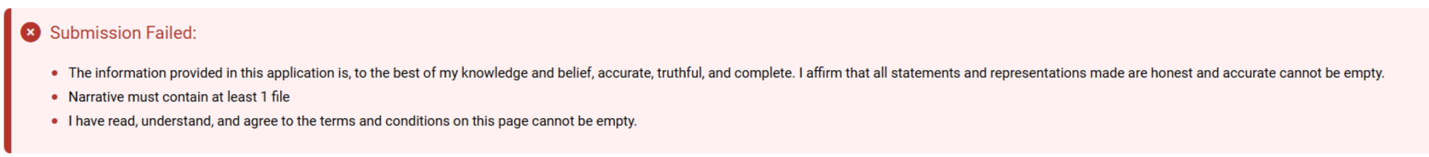
After this, there are two additional optional surveys. The first survey last tab is a demographics survey. Any information you provide as part of this survey is confidential and will not be used during the review process or considered in funding decisions. We request this information to help us understand the aggregate trends in the fields we support. We encourage applicants to view our demographic data policy on our website.



The second survey will ask questions concerning your experience as an applicant. This survey is also confidential and is used to collect information that can help us improve the applicant experience in the future.

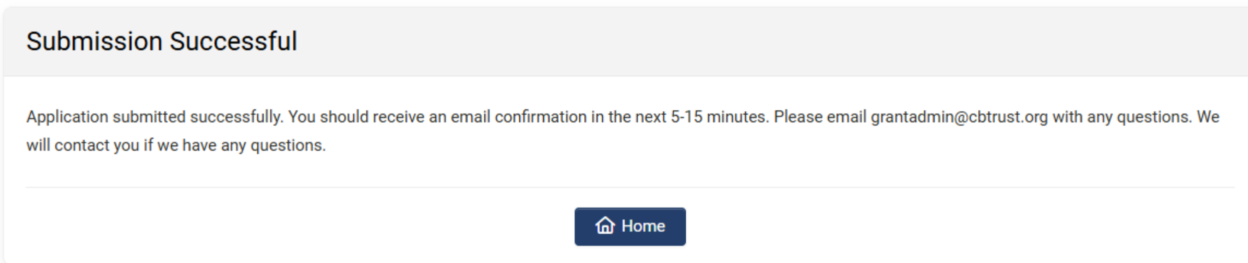


Once you've filled out all sections and are ready to submit your application, click the "Submit" button. If you've skipped any required questions, you will see a red box titled "Submission Failed". This will include a list of all the fields that you still need to complete.

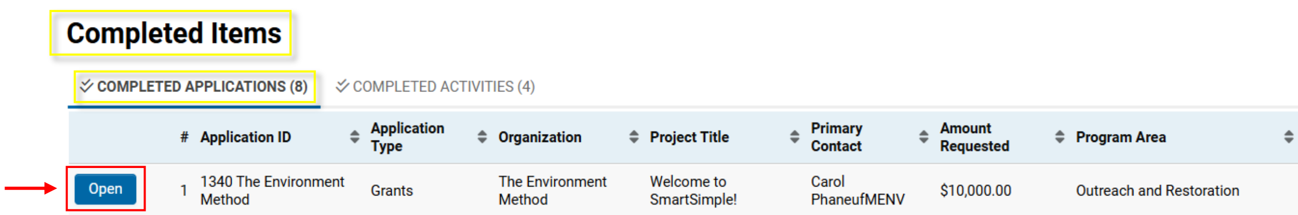


If you click on any of the bullet points in the list, you will automatically be taken to the field that needs to be completed. Your application cannot be submitted until all required fields have been filled out.

If your application is successfully submitted, you will see the following screen:



You will also receive an email confirming that your application has been submitted. When you return to the Home page, your application will have moved from the Action Items section to the Completed Items section. You will be able to see it under the tab titled “Completed Applications”.



You can click “open” to view your application. Once it has been submitted, you will no longer be able to make any edits. If you need to make any changes to your application after it has been submitted, please contact Trust staff.