

SmartSimple Manual

For Environmental Initiatives Grant Applicants

* If you find issues with the instructions in this document please let us know at environmental.initiatives@reddeer.ca.

General Hints

- At the bottom of every screen select “SAVE MY WORK” frequently as your answers are not automatically saved. Always save your work before choosing "NEXT" or closing your application.
- The “NEXT” button is in the lower right corner of your screen. Instead of clicking “NEXT” you can click into the individual tabs found in the middle of the page: APPLICATION GUIDELINES, ORGANIZATIONAL PURPOSE, PROJECT OVERVIEW, OUTCOMES FOCUS, BUDGET, AGREEMENT NOTICE.
- You can save your work and return to your application. Do not begin a new application if you have saved previously. Scroll down on your Home page under My Applications to see it.
- Clicking on your browser’s back arrow won’t necessarily get you to the previous screen and may log you out. Change tabs as outlined above.
- SmartSimple will require you to log in again after 30 minutes of inactivity.

Registration

1. If an account has not already been set up for your organization, register as a new user on the SmartSimple login page: **reddeer.smartsimple.ca**. Do not put “www” in front of this web address.

[Register Here](#)

If you don’t know if your organization has an account or don’t know your organization’s login information, email environmental.initiatives@reddeer.ca and copy your organization’s Executive Director or President. One organizational account should be used to apply for all available City grants, present and future.

2. Enter in basic agency and staff information in the required fields (they have a red asterisk next to them). *
3. An e-mail will be sent out with a temporary password. When signing in for the first time, you will be prompted to change your password.

Home Page

Once signed in you will be able to view your “Home Page”.

The screenshot shows the Red Deer FCSS Funding Portal home page. At the top, there is a navigation bar with the Red Deer and FCSS logos on the left, and links for Home, Overview, Tutorial Videos, a lock icon, a bell icon, and a user profile icon labeled 'A'. The main heading reads "Welcome Amber, to the Red Deer FCSS Funding Portal!". Below this is an "Overview" section with six cards: "Update my Organization Profile" (with a person icon), "Grant Opportunities" (with the number 2), "Reports to Complete" (with the number 0 and a note about outstanding reports), "Applicant Q&A" (with a question mark icon), "FCSS Guiding Documents" (with a document icon), and "Grant Application Process (GAP)" (with a flowchart icon). Below the overview is a "My Applications" section with a folder icon and a status bar showing: DRAFT (1), SUBMITTED (1), UNDER REVIEW (1), BUDGET REVISIONS (1), and COMPLETED (0). At the bottom right of the status bar, it says "1-1 of 1" with left and right navigation arrows.

The most relevant parts of this page are that it is where you can:

- See what Grant Opportunities are currently open to apply for
- Access your grant applications
- Access your Organization Profile
- Any information disclosed to any applicant will be shared in an Addenda in the “Applicant Q&A”
- If your application is approved, what reports you need to complete

Organization Profile

1. On the Home Page, click on “Update my Organization Profile” to enter in your organization’s details. When you set up organizational profile the first time it will say “Welcome: Red Deer & District FCSS Login Information”. That’s us!
2. **You do not need to enter all the information requested in the Organization Profile. Please complete as outlined in this table.**

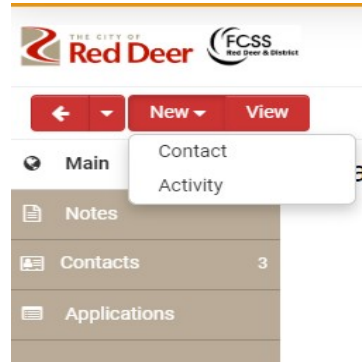
Field	Response required
Organization Name	YES
Phone	YES
Fax	NO

Website	IF YOU HAVE ONE
Profile Image	NO
Address and Address 2	YES
City	YES
Country	YES
Province	YES
Postal Code	YES
Primary Contact	YES
Owner	<p>This is the person that the reports will be assigned to. It is recommended that the ED or head of the organization be the owner of the application as this will give them access to the application and all the subsequent reports generated to the project. They will not have to do all the work, but they will be accountable.</p> <p>Choose a contact by clicking the binoculars next to the field. You may need to add them as a contact first. See instructions below.</p>
Parent Company	NO
Identification	CHOOSE CHARITY OR NON-PROFIT THEN ADD CHARITABLE OR NON-PROFIT NUMBER AS APPLICABLE
Certify Good Standing	YES
Upload Company Image	NO
Organization History	YES, 200 WORDS MAX
Organization Chart	NO
Mission and Vision	YES, 200 WORDS MAX
Board of Directors questions	NO
Staff questions	NO
Volunteers question	NO
Applicant Authorization	YES
Audited Financial Statement	YES
Does your organization have reliable funding sources	NO
Organization Budget questions	NO
Financial Control Systems	NO

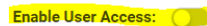
3. **Do not click on “Validate”** at the bottom of the screen. Because you have not completed all the required fields, you will not be able to validate but you will still be able to submit an application. Ignore any prompts to validate your Organization Profile.
4. You may want to give other people from your organization access to the account: people who will contribute to the application or be ultimately responsible for the grant (i.e. Executive Director or

President). If this is the case, email environmental.initiatives@reddeer.ca to upgrade your role in the system and we will provide you with additional control.


Once your role has been changed, you will be able to add a contact by going to “Update my Organization Profile”, then clicking “New” at the top left side of the screen and choosing “Contact”.



- i. Check “Agency Staff”, fill in the required fields and click “Activate”
- ii. Click on “Options” and “Roles and Access” from the dropdown. Click “Enable User Access” and then save.



Grant Application

1. On the Home Page, click on the “Grant Opportunities” button
2. For the Environmental Initiatives Grant click on the red “Begin Application” button
3. Choose the “Owner” of the application. This should be the Executive Director or head of the organization as this will give them access to the application and all of the subsequent reports required. Choose the appropriate contact from your organization by clicking the binoculars  next to the name of the applicant. This is the person that the reports will be assigned to. (You can also change the owner of the report after they are created).
4. Press the “Save My Work” button to begin entering in information.
 - *** SAVE YOUR WORK OFTEN WHILE COMPLETING YOUR APPLICATION ***
 - a) Your saved application can be found in the “Draft” tab under “My Applications” in your Portal.


Grants

📄 DRAFT (2) 📄 SUBMITTED (0) ✓ APPROVED (6)

#	Application ID	Program	Type	Program Location	Program Span	Status
1	FCSS-18-0156	Beatles Test Agency: ()	Playschools			Draft
2	FCSS-18-0147	Beatles Test Agency: ()	Indirect Services			Draft

5. Move through the tabs and fill in required fields. They won't be the same names, but the tabs are in the middle of the page and look like this:



6. Once you have entered all the required information and uploaded the required documents you can click the "Submit Application" button at the bottom of the screen. 
7. The application will now appear in the "submitted" tab under "My Applications" on the Home Page. You will be able to view the status of your application in your Portal from "Submitted", to "Under Review", to "Completed" once/if the application has been approved.
8. You will be notified by e-mail if your application has been approved or denied.

Reporting

1. Once an application is approved, reports for each funded project will be created and found in the main contact's Home Page in "Reports to Complete".

2. You can go into the report and change the owner by clicking on the binoculars and choosing a contact from your organization.

* Owner: 

- a) The report will now appear in that staff's Home Page under "Reports to Complete".

For further support please contact the Environmental Initiatives team at

environmental.initiatives@reddeer.ca.

e-mail Jamie.McGillicky@reddeer.ca