



SmartSimple GMS Instruction Manual

Applicant

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GENERAL INFORMATION & RESOURCES

SmartSimple Grants Management System (GMS) allows applicants to manage their applications for different funding programs, follow the status of applications, receive any post-award information, submit requested materials, and communicate with PSI Staff.

Support:

Please contact PSI staff if you encounter any issues. PSI can be reached at psif@psifoundation.org.

LOGIN SCREEN

Login Credentials:

The login page is located at <https://psifoundation.smartsimple.ca/>

You will need to register if you are a first-time user, or if credentials have not been sent to you by PSI.

PSI
FOUNDATION

Login

Email

Password

Login

[Forgot Password?](#)

New to the System?
[Register Here](#)

Welcome to PSI Foundation

Welcome to PSI Foundation's grants management system.

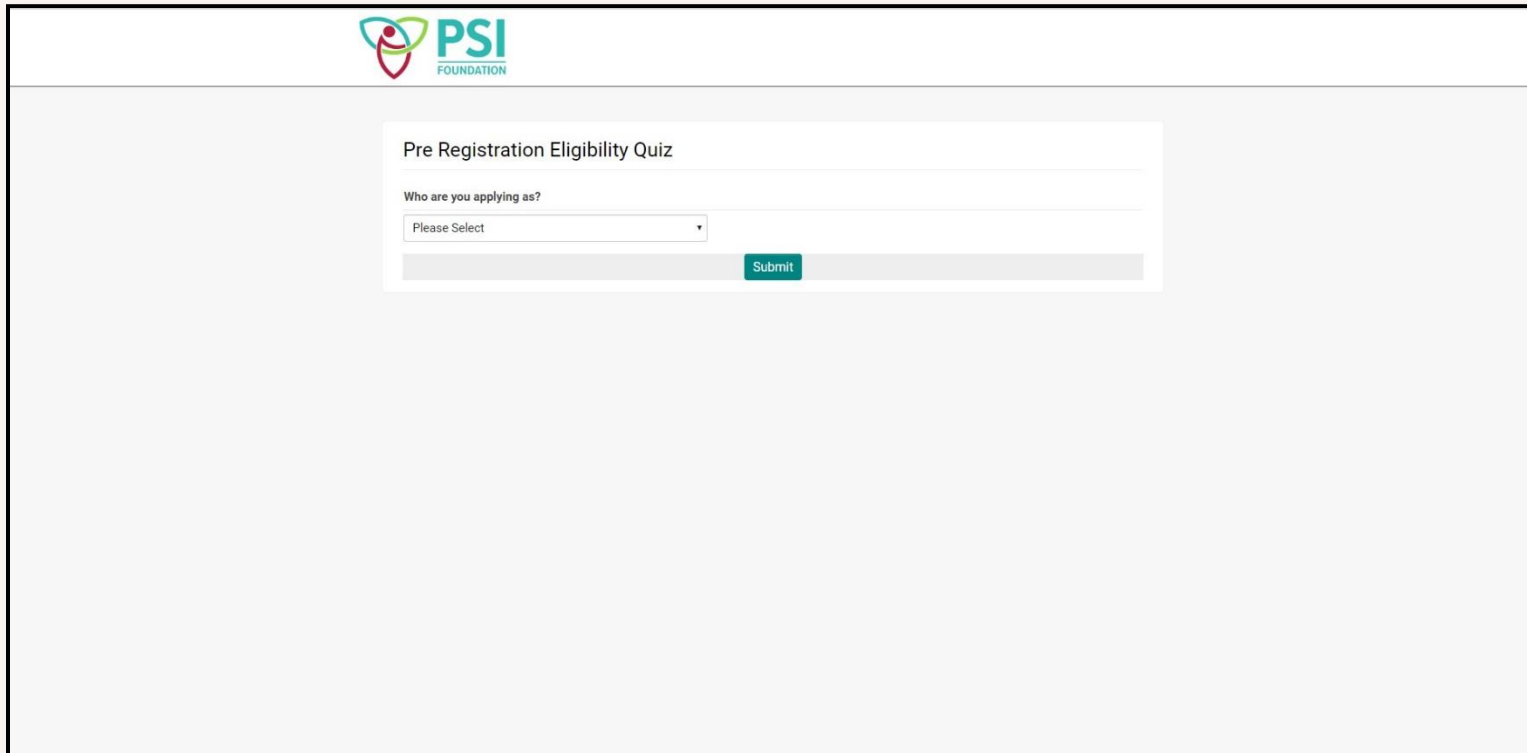
Established in 1970 by the physicians of Ontario, PSI Foundation is a physician-sponsored granting agency whose mission is to improve the health of Ontarians.

This system allows researchers to apply for PSI Foundation's funding programs, follow the status of applications, submit any post-award information, review assigned applications and communicate with the foundation.

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REGISTRATION

To register, please click on 'Register Now' on the login screen. You will be directed to complete a short quiz to determine your eligibility to apply to PSI.



The screenshot shows the PSI Foundation logo at the top left. Below it is a form titled "Pre Registration Eligibility Quiz". The form contains a question "Who are you applying as?" followed by a dropdown menu with the text "Please Select" and a small downward arrow. To the right of the dropdown is a teal "Submit" button.

PSI
FOUNDATION

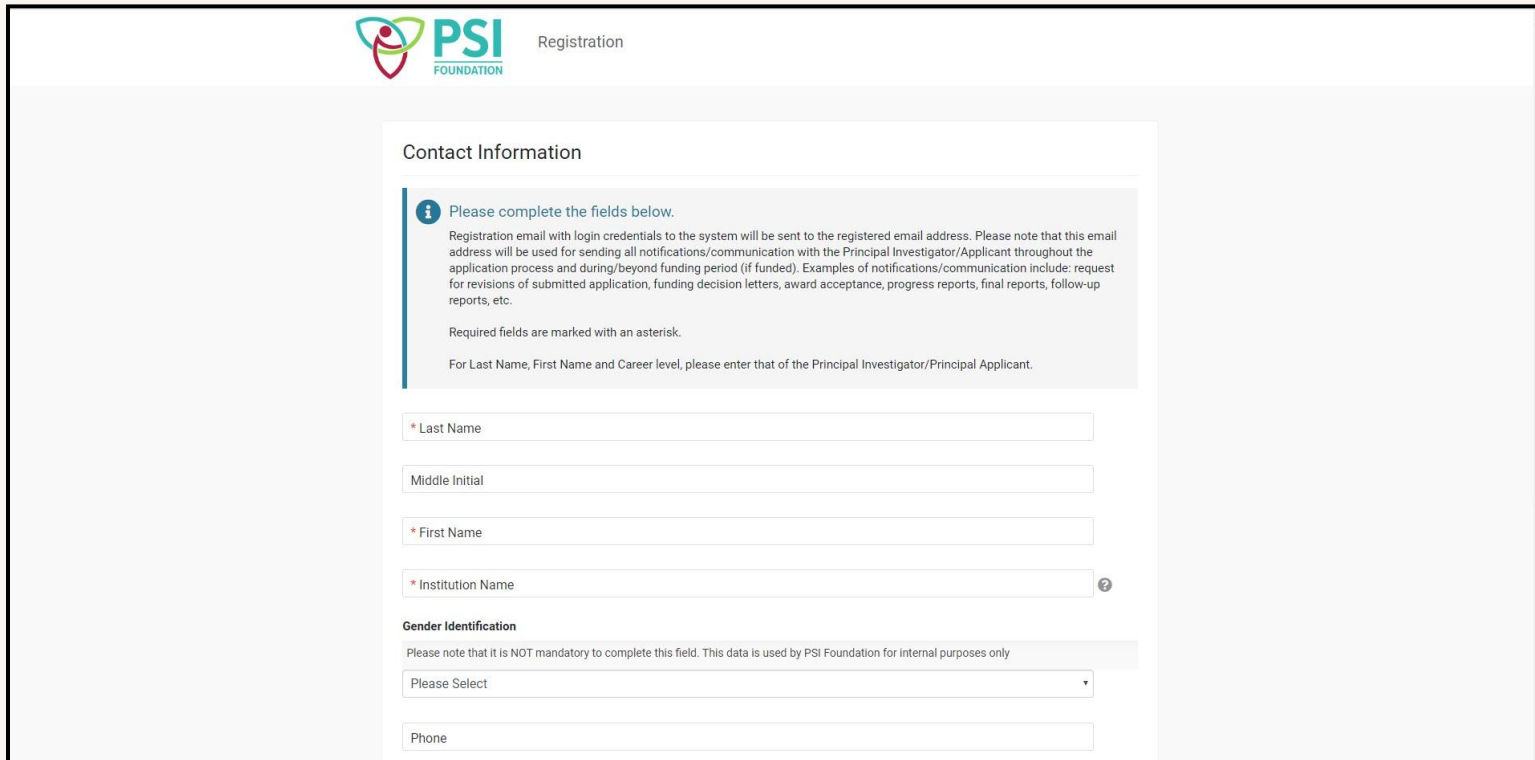
Pre Registration Eligibility Quiz

Who are you applying as?

Please Select

Submit

Once you have completed the eligibility quiz, you will be asked to complete registration. Once complete, you will receive an email with your password. Please return to the login screen to sign in.



The screenshot shows the PSI Foundation Registration page. At the top left is the PSI Foundation logo, which consists of a stylized figure in red and green. To the right of the logo is the text "PSI FOUNDATION" and "Registration".

The main content area is titled "Contact Information". Below this title is a grey box containing an information icon and the text: "Please complete the fields below. Registration email with login credentials to the system will be sent to the registered email address. Please note that this email address will be used for sending all notifications/communication with the Principal Investigator/Applicant throughout the application process and during/beyond funding period (if funded). Examples of notifications/communication include: request for revisions of submitted application, funding decision letters, award acceptance, progress reports, final reports, follow-up reports, etc. Required fields are marked with an asterisk. For Last Name, First Name and Career level, please enter that of the Principal Investigator/Principal Applicant."

Below the grey box are four text input fields:

- * Last Name
- Middle Initial
- * First Name
- * Institution Name (with a question mark icon)

Below these fields is a section titled "Gender Identification". It contains a grey box with the text: "Please note that it is NOT mandatory to complete this field. This data is used by PSI Foundation for internal purposes only". Below this is a dropdown menu with the text "Please Select" and a downward arrow. At the bottom of the form is a text input field labeled "Phone".

APPLICANT PORTAL

Once you have logged in, you will see the screen below. This is your Applicant Portal. From this screen you can view funding opportunities, applications you have in progress, applications you have submitted, and results of submitted applications. If you receive a grant, under Activities you will be able to track and submit reports (including start date/REB Approval/Clinical Trials Registration/Health Canada Approval/Financial Statements/Final Report) to PSI and also keep track of payment status.

New users are advised to change their password after logging in the first time. This can be completed by clicking on the circle with your initial located in the top right corner and choosing change password.

The screenshot displays the Applicant Portal dashboard. At the top left is the PSI FOUNDATION logo. At the top right are links for Home, a notification bell, and a user profile icon with the letter 'J'. The main content area is titled "Welcome Applicant" and features a "My Profile" button with a person icon. Below this is the "Applications" section, which includes four cards: "Funding Opportunities" with a count of 7, "In Progress" with 0, "Submitted" with 0, and "Approved/ Declined/Cancelled" with 0. The "Activities" section follows, with two cards: "Pending" with 0 and "Completed" with 0.

Category	Count
Funding Opportunities	7
In Progress	0
Submitted	0
Approved/ Declined/Cancelled	0
Pending	0
Completed	0

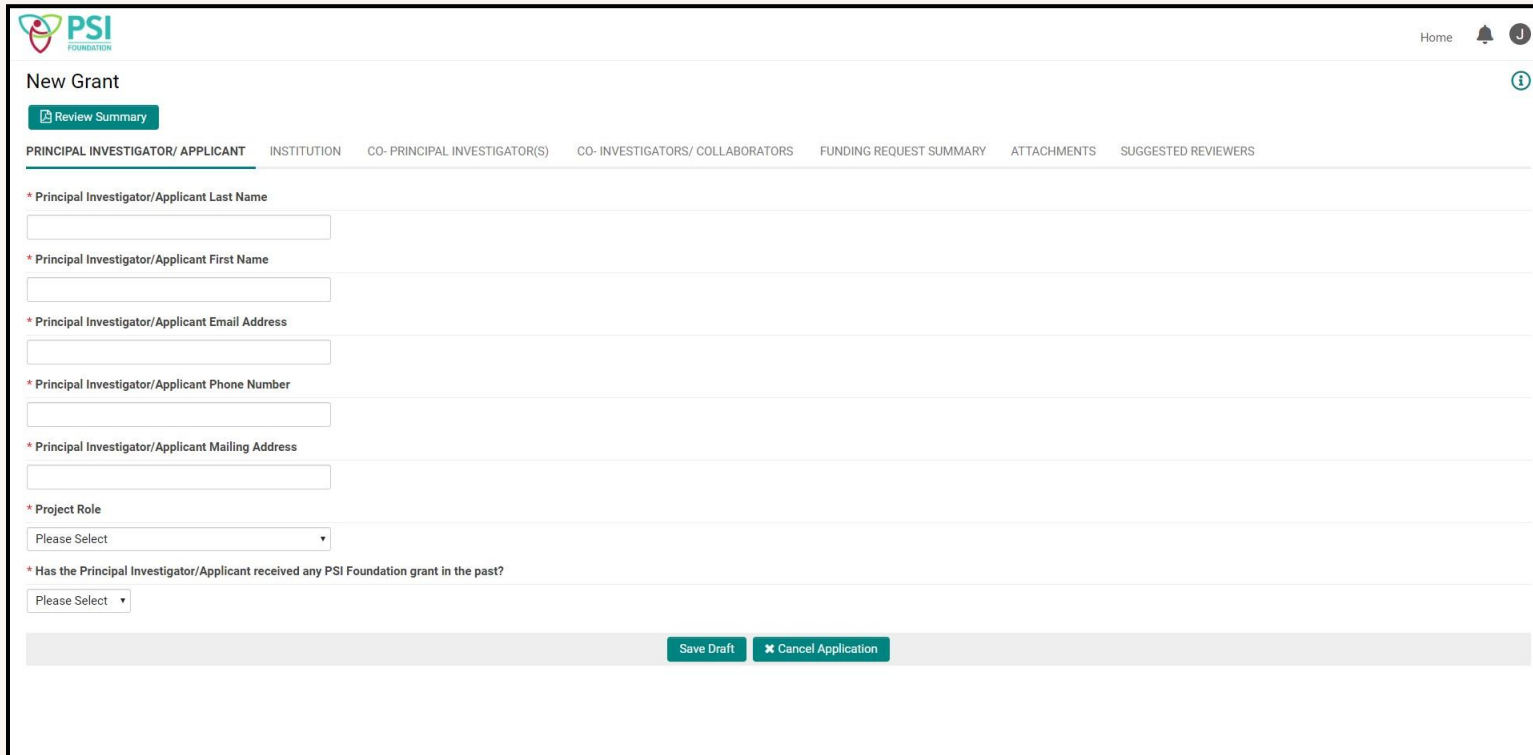
To view available grants, please click on Funding Opportunities. A list of funding options will appear, from which you can select the appropriate one to apply for.

The screenshot shows the PSI Foundation website's 'Funding Opportunities' page. The page features a search bar at the top right with a magnifying glass icon and a '1-7 of 7' indicator. Below the search bar is a list of funding categories, each with an 'Apply Now' button. The categories are: Clinical Research, Medical Education Research at the Post M.D. Level, Health Systems Research, New Investigator, Resident Research, Healthcare Research by Community Physicians, and Educational Fellowship for Practicing Physicians. The PSI Foundation logo is in the top left corner, and 'Home' with a bell icon is in the top right corner.

Application Details
Clinical Research Apply Now
Medical Education Research at the Post M.D. Level Apply Now
Health Systems Research Apply Now
New Investigator Apply Now
Resident Research Apply Now
Healthcare Research by Community Physicians Apply Now
Educational Fellowship for Practicing Physicians Apply Now

SUBMITTING AN APPLICATION

Once you have chosen a funding opportunity to apply for, please click Apply Now. A new grant application will open as seen below.



The screenshot shows the 'New Grant' application form for the PSI Foundation. The form is titled 'New Grant' and includes a 'Review Summary' button. The form is divided into several sections by tabs: 'PRINCIPAL INVESTIGATOR/ APPLICANT', 'INSTITUTION', 'CO- PRINCIPAL INVESTIGATOR(S)', 'CO- INVESTIGATORS/ COLLABORATORS', 'FUNDING REQUEST SUMMARY', 'ATTACHMENTS', and 'SUGGESTED REVIEWERS'. The 'PRINCIPAL INVESTIGATOR/ APPLICANT' section is currently active and contains the following fields:

- * Principal Investigator/Applicant Last Name (text input)
- * Principal Investigator/Applicant First Name (text input)
- * Principal Investigator/Applicant Email Address (text input)
- * Principal Investigator/Applicant Phone Number (text input)
- * Principal Investigator/Applicant Mailing Address (text input)
- * Project Role (dropdown menu with 'Please Select' selected)
- * Has the Principal Investigator/Applicant received any PSI Foundation grant in the past? (dropdown menu with 'Please Select' selected)

At the bottom of the form, there are two buttons: 'Save Draft' and 'Cancel Application'.

Each item will need to be completed in order to submit your application. Fields marked with a red star are mandatory. Each application has sections denoted by tabs along the top. You will need to click through these tabs to view and complete all the required information.

Some items will require you to save a draft of your application before you complete them. An example of this is Budget Details as below. Once you have saved a draft of your application, a button saying 'Enter budget details' will appear.

PSI FOUNDATION Home [User Profile]

Main | 2020-1403 Clinical Research [Info] [Print]

PRINCIPAL INVESTIGATOR/ APPLICANT INSTITUTION CO- PRINCIPAL INVESTIGATOR(S) CO- INVESTIGATORS/ COLLABORATORS **FUNDING REQUEST SUMMARY** ATTACHMENTS SUGGESTED REVIEWERS

As it could take up to 6 months for a funding decision, proposed start dates should be no earlier than 6 months from submission. Start dates can always be revised on funding. PSI does not fund ongoing research.

mm/dd/yyyy [Calendar]

* Proposed End Date

mm/dd/yyyy [Calendar]

* Is this a resubmission of a previously declined application to the Foundation?

Please Select [Dropdown]

* Have you applied/intending to apply for other funding from another source?

Results of funding from other sources may affect your approved budget, therefore please notify the Foundation immediately if you have received other funding.

Please Select [Dropdown]

* Lay Summary

Describe objectives and methodology in plain language. If funded, this description will be used to describe your project in Foundation communications.

[Text Area]

Budget

Please enter budget details

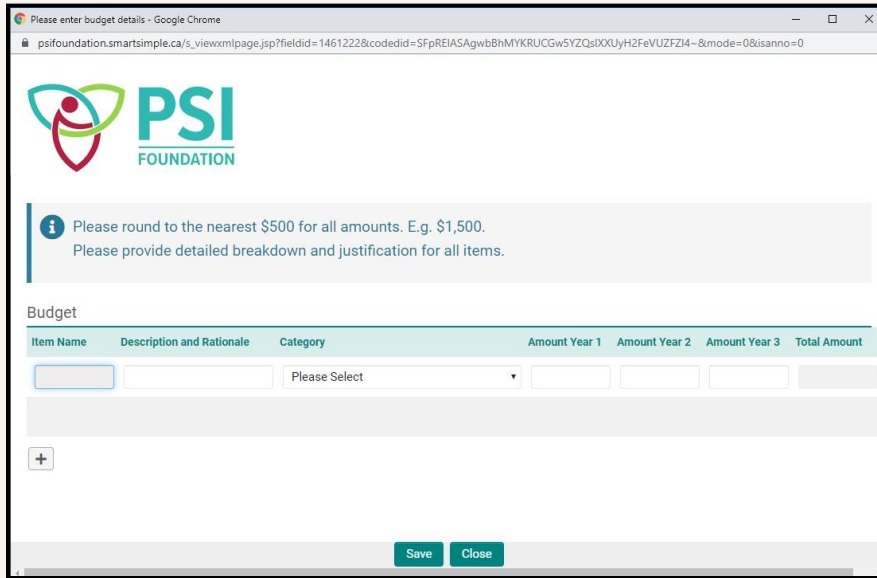
Enter budget details

Budget

◀ BACK [Next Page] NEXT ▶

Save Draft Cancel Application

When this button is clicked, a window will open which will allow you to enter your full budget. Please add items by using a '+' button.



The screenshot shows a web browser window titled "Please enter budget details - Google Chrome". The URL is "psifoundation.smartsimple.ca/s_viewxmlpage.jsp?fieldid=1461222&codedid=5FpREIASAgwbBhMYKRUCGw5YZQsXXUyH2FeVUZFI4--&mode=0&isanno=0". The PSI Foundation logo is at the top left. Below it is an information box with an 'i' icon: "Please round to the nearest \$500 for all amounts. E.g. \$1,500. Please provide detailed breakdown and justification for all items." Below this is a "Budget" section with a table. The table has columns: "Item Name", "Description and Rationale", "Category", "Amount Year 1", "Amount Year 2", "Amount Year 3", and "Total Amount". The first row has a text input field for "Item Name", a text input field for "Description and Rationale", a dropdown menu for "Category" with "Please Select" selected, and three empty text input fields for "Amount Year 1", "Amount Year 2", and "Amount Year 3". Below the table is a "+" button. At the bottom of the form are "Save" and "Close" buttons.

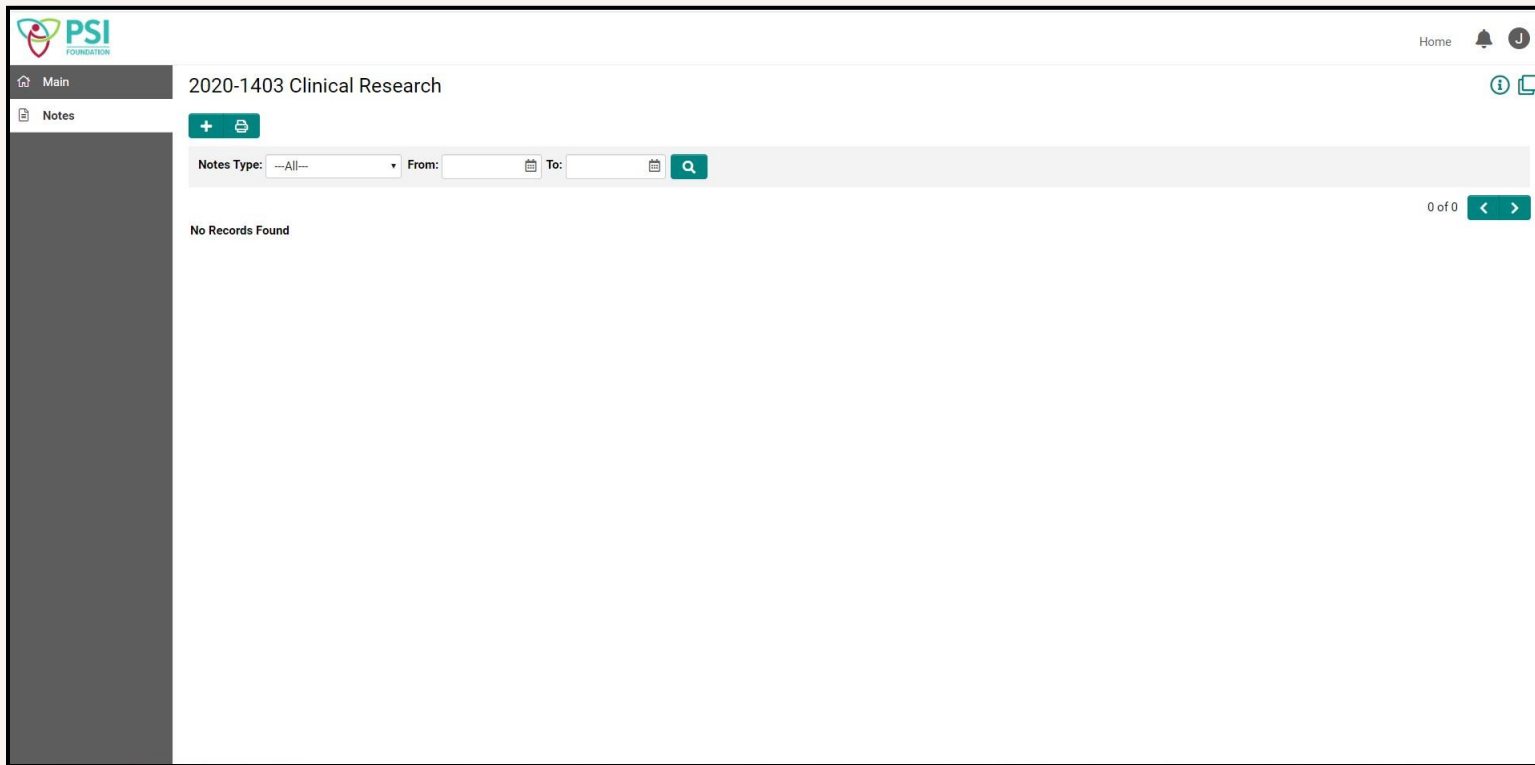
Item Name	Description and Rationale	Category	Amount Year 1	Amount Year 2	Amount Year 3	Total Amount
<input type="text"/>	<input type="text"/>	Please Select	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Once you have completed your application in full, you may view a summary by choosing 'Application Summary' near the top of the page. When you are satisfied with your application, and everything has been completed, you may click 'Submit to PSI'. Upon submission you will receive an email acknowledging your application has been received. You will also receive an email if your application is accepted or if revisions are required.

OTHER FEATURES

NOTES

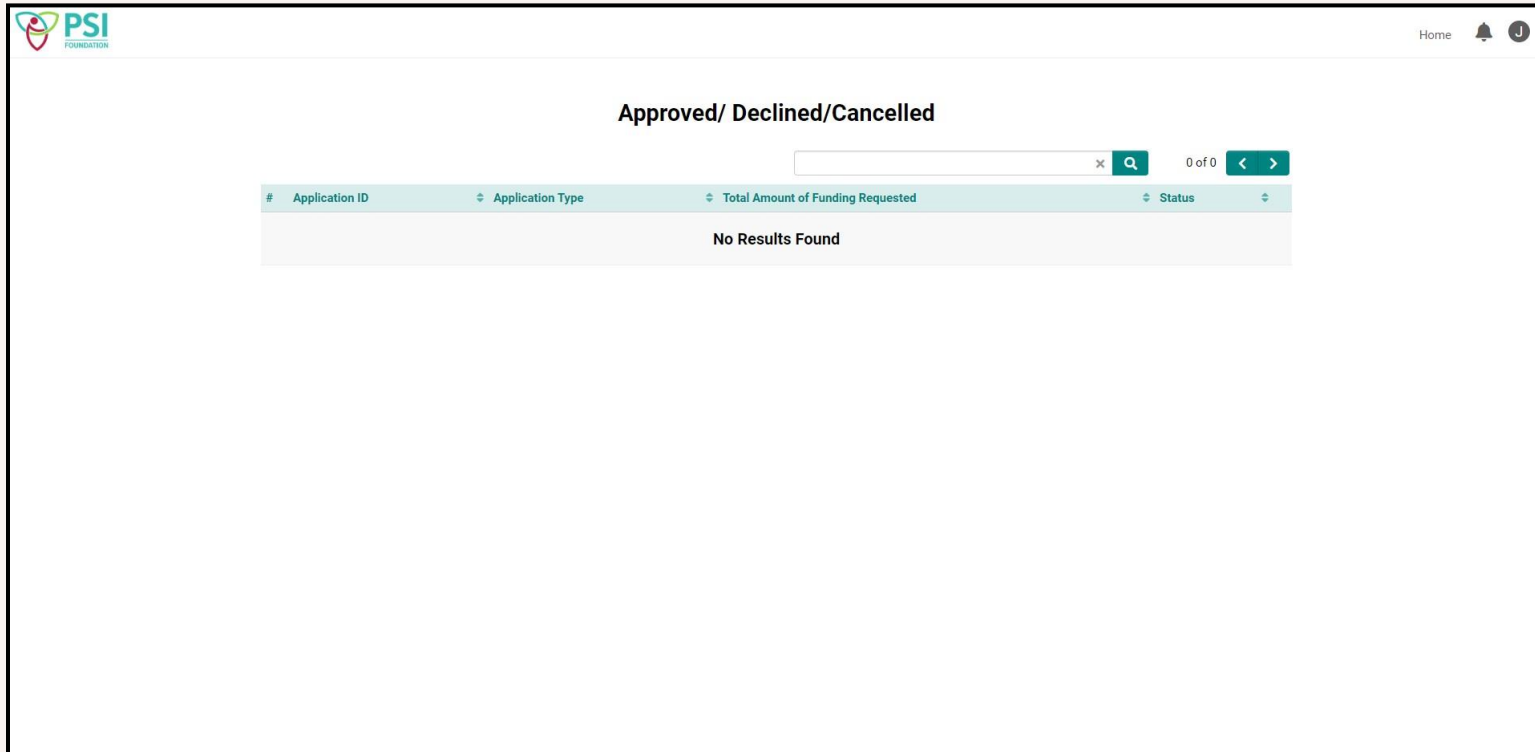
Once you have saved a draft of your application, a bar will appear to the left. On this bar is a feature called Notes. You will be able to view communication from PSI staff about your application in this section (you will also receive email notification as mentioned above).



The screenshot displays the PSI Foundation application interface. At the top left is the PSI FOUNDATION logo. The top right corner contains a 'Home' link, a notification bell icon, and a user profile icon. Below the logo, a navigation bar shows 'Main' and 'Notes' options. The main content area is titled '2020-1403 Clinical Research' and includes a '+ Notes' button. A search bar is present with fields for 'Notes Type' (set to '--All--'), 'From:', and 'To:', along with a search icon. The bottom right of the search area shows '0 of 0' and navigation arrows. The main content area displays 'No Records Found'.

APPROVED/DECLINED/CANCELLED

From your Applicant Portal, you can click on Approved/Declined/Cancelled. This will show you a summary of all your applications and the results.



The screenshot displays the PSI Foundation Applicant Portal interface. At the top left is the PSI FOUNDATION logo. At the top right are links for 'Home', a notification bell, and a user profile icon. The main heading is 'Approved/ Declined/Cancelled'. Below this is a search bar with a magnifying glass icon and a '0 of 0' indicator with left and right navigation arrows. A table with the following headers is shown: '#', 'Application ID', 'Application Type', 'Total Amount of Funding Requested', and 'Status'. The table body contains the text 'No Results Found'.

#	Application ID	Application Type	Total Amount of Funding Requested	Status
No Results Found				