



SmartSimple GMS Instruction Manual

PSI Graham Farquharson Knowledge Translation Fellowship

&

PSI Research Trainee Award

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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.

Please Note: For PSI Graham Farquharson Knowledge Translation Fellowship and PSI Research Trainee Award, applications must be submitted by a University Contact (i.e. a representative from the medical university), not the candidate. A University Contact from each medical university is required to register and create an account in GMS, start the online application, then submit the application to PSI. If applicable, a University Contact may also invite the candidate to complete fields in the application before submitting to PSI.

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.



Login

Email

Password

Login

[Forgot Password?](#)

New to the System?

Register Here

Welcome to PSI Foundation

Welcome to PSI Foundation's grants management system.

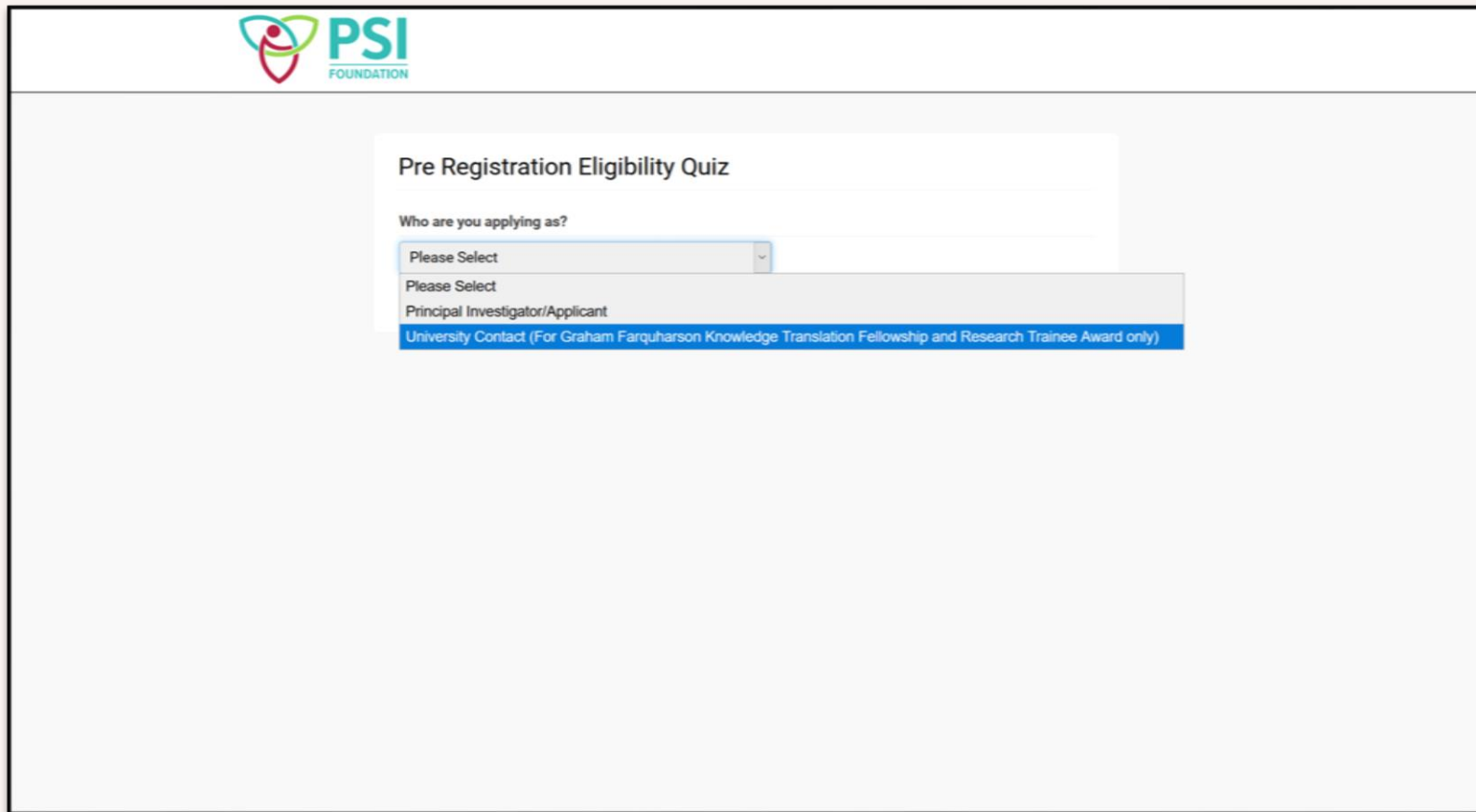
Established in 1970 by the physicians of Ontario, PSI Foundation is a physician-sponsored granting agency whose mission is to improve the health of Ontarians.

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 – UNIVERSITY CONTACT

For University Contact 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. For the first question "Who are you applying as?", select "University Contact."



PSI FOUNDATION

Pre Registration Eligibility Quiz

Who are you applying as?

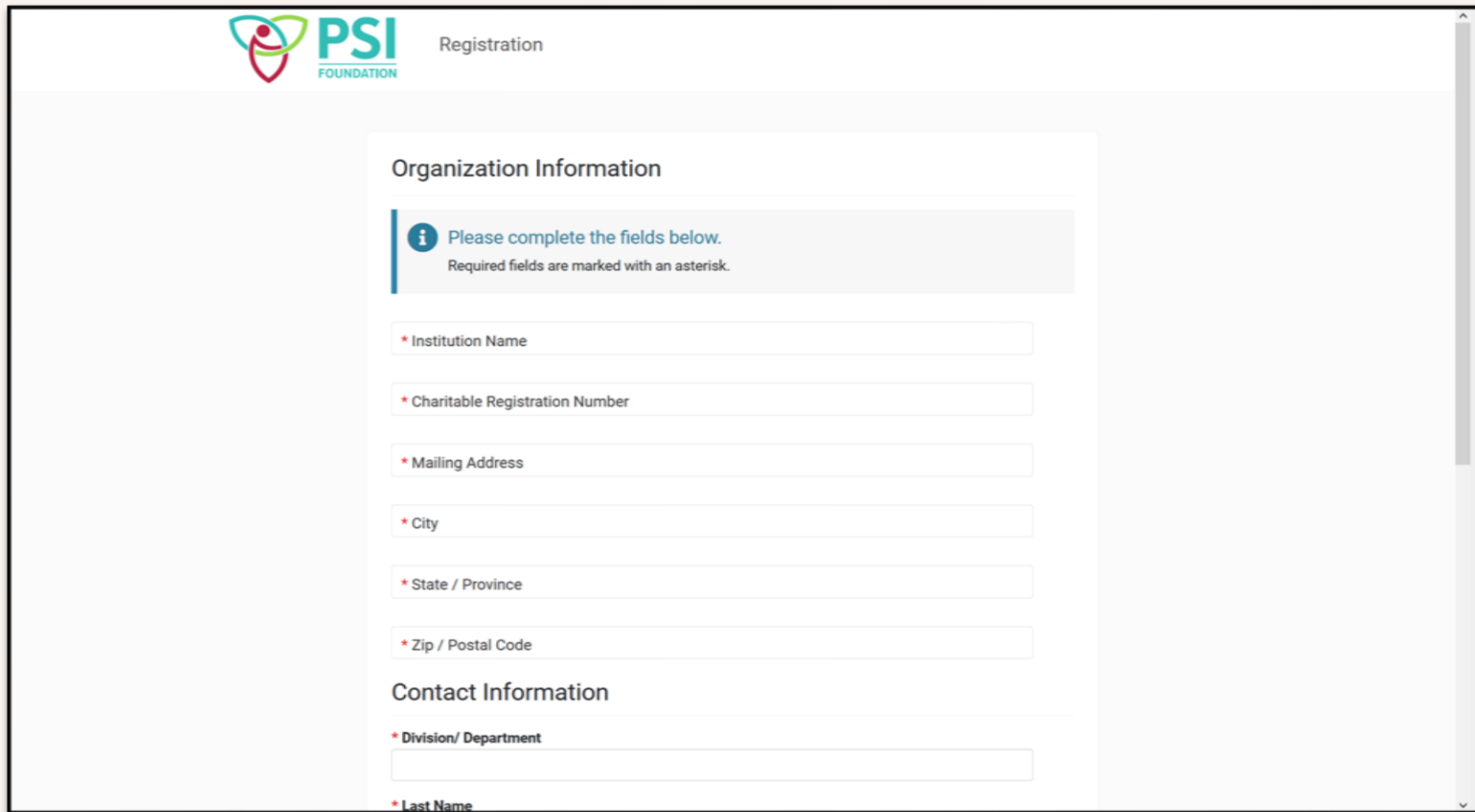
Please Select

Please Select

Principal Investigator/Applicant

University Contact (For Graham Farquharson Knowledge Translation Fellowship and Research Trainee Award only)

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.

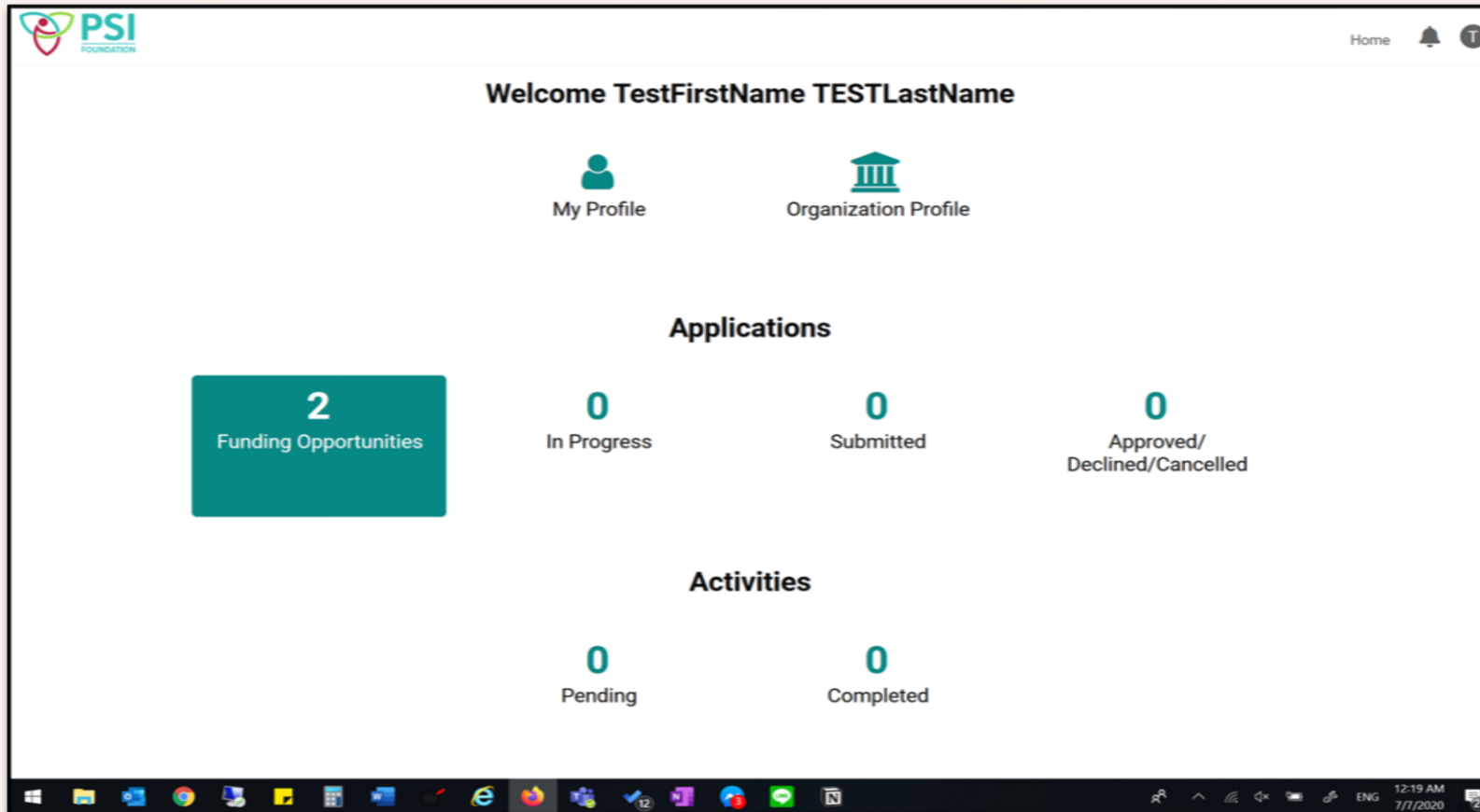


The screenshot displays the registration page for the PSI Foundation. At the top left is the PSI Foundation logo, which consists of a stylized figure in red and green. To the right of the logo, the text "PSI FOUNDATION" is displayed in blue and green, followed by the word "Registration" in a smaller grey font. The main content area is titled "Organization Information" and contains a grey informational box with a blue 'i' icon and the text "Please complete the fields below. Required fields are marked with an asterisk." Below this box are seven text input fields, each with a red asterisk indicating it is required: "Institution Name", "Charitable Registration Number", "Mailing Address", "City", "State / Province", "Zip / Postal Code", and "Division/ Department". The "Division/ Department" field is partially filled with the text "Division/ Department". At the bottom of the form, the label "* Last Name" is visible, but the corresponding input field is not fully shown.

UNIVERSITY COTNACT PORTAL

Once you have logged in, you will see the screen below. This is your University Contact Portal. From this screen you can view funding opportunities, applications you have in progress, applications you have submitted, and results of submitted applications

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.



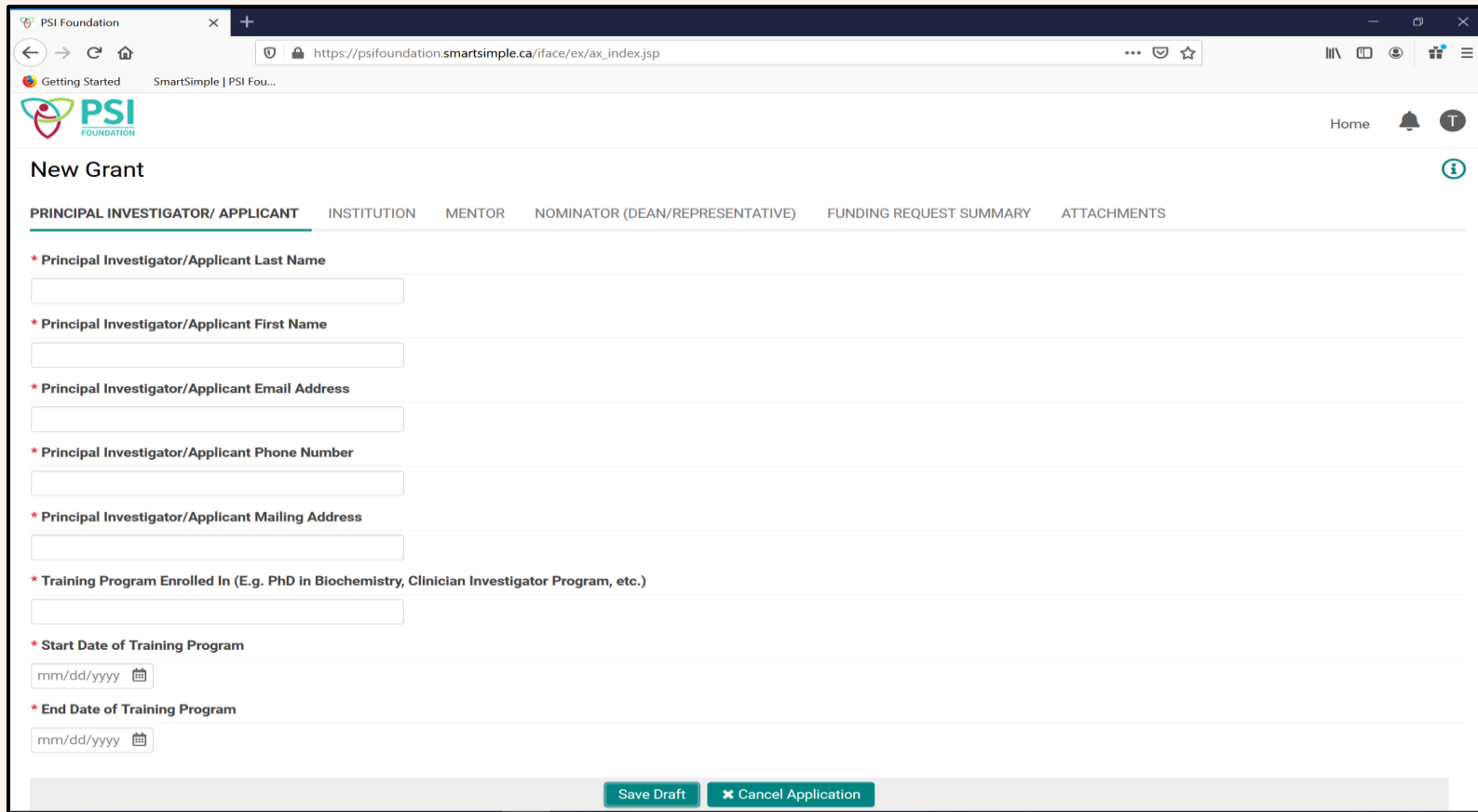
To view available awards, please click on Funding Opportunities. A list of funding options will appear, from which you can select the appropriate one to apply for.

The screenshot shows the PSI Foundation website's 'Funding Opportunities' page. The top left corner features the PSI Foundation logo, and the top right corner has navigation links for 'Home', a notification bell, and a user profile icon. The main heading is 'Funding Opportunities'. Below this is a search bar with a magnifying glass icon and a '1-2 of 2' indicator with left and right arrow buttons. A dropdown menu titled 'Application Details' is open, showing two items: 'PSI Graham Farquharson Knowledge Translation Fellowship' and 'Research Trainee Award'. The first item has a warning icon and the text 'ROUND NOT OPEN!'. Below the second item is a green 'Apply Now' button.

SUBMITTING AN APPLICATION

COMPLETING MANDATORY FIELDS

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



The screenshot shows a web browser window with the URL https://psifoundation.smartsimple.ca/iface/ex/ax_index.jsp. The page title is "New Grant" and it features a navigation bar with tabs: "PRINCIPAL INVESTIGATOR/ APPLICANT" (selected), "INSTITUTION", "MENTOR", "NOMINATOR (DEAN/REPRESENTATIVE)", "FUNDING REQUEST SUMMARY", and "ATTACHMENTS". The form contains several mandatory fields, each marked with a red asterisk:

- * Principal Investigator/Applicant Last Name
- * Principal Investigator/Applicant First Name
- * Principal Investigator/Applicant Email Address
- * Principal Investigator/Applicant Phone Number
- * Principal Investigator/Applicant Mailing Address
- * Training Program Enrolled In (E.g. PhD in Biochemistry, Clinician Investigator Program, etc.)
- * Start Date of Training Program (with a date picker icon)
- * End Date of Training Program (with a date picker icon)

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.

The screenshot displays the PSI Foundation application interface. At the top, the PSI logo is on the left, and navigation links for Task Tracker, Submission Manager, Committee Manager, Program Manager, and CRM are on the right. A user profile icon is also present. Below the navigation, there are buttons for 'New' and 'Options', and a '1 of 1' indicator with navigation arrows. A sidebar on the left contains links for 'Main', 'Notes', 'Assigned Con...', 'Invitations', and 'Activities'. The main content area shows the application ID '2020-1874' and a breadcrumb trail: INTERNAL > PRINCIPAL INVESTIGATOR/ APPLICANT > INSTITUTION > MENTOR > NOMINATOR (DEAN/REPRESENTATIVE) > **FUNDING REQUEST SUMMARY** > ATTACHME. The 'FUNDING REQUEST SUMMARY' section includes a date field set to 08/01/2021, a 'Proposed End Date' field set to 11/30/2022, and a question: '* Have you applied/intending to apply for other funding from another source?'. Below this is a text box with the instruction: 'Results of funding from other sources may affect your approved budget, therefore please notify the Foundation immediately if you have received other funding.' and a dropdown menu currently set to 'No'. The 'Lay Summary' section has a text area with the placeholder text 'Test321'. At the bottom, a 'Budget' section is partially visible with the instruction '* Please enter budget details' and a green button labeled 'Enter budget details'. At the very bottom of the page, there are three buttons: 'Save Draft', 'Submit to PSI', and 'Delete'. Navigation buttons for 'BACK' and 'NEXT' are also present.

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 address bar contains the URL: `psifoundation.smartsimple.ca/s_viewxmlpage.jsp?fieldid=1461222&codedid=HVI2LEI8YTgiN3MiJlMVFAEtI AhvBTIVH2FZUUNHY1o~&mode=0&isanno...`

The page header features the PSI FOUNDATION logo, which consists of a stylized human figure in red and green, followed by the text "PSI FOUNDATION" in blue.

Below the logo is an information icon (i) and a message: "Please round to the nearest \$500 for all amounts. E.g. \$1,500."

The main section is titled "Budget" and contains a table with the following columns: "Item Name", "Description and Rationale", "Category", "Amount Year 1", "Amount Year 2", and "Total Amount".

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

Below the table is a plus sign (+) button to add new items.

At the bottom of the form are two buttons: "Save" and "Close".

INVITING THE CANDIDATE TO COMPLETE APPLICATION FORM

For the PSI Graham Farquharson Knowledge Translation Fellowship and PSI Research Trainee Awards, the GMS allows University Contacts to invite the candidate to complete the application form. Please note that while a candidate can complete the different sections and fields, the application must be submitted to PSI by the University Contact (not the candidate).

To invite a candidate to access and complete the application form, once you have started the application and saved a draft, click on the 'Invite Researcher' button at the bottom of the screen.

The screenshot displays the PSI Foundation application form interface. The top navigation bar includes 'Task Tracker', 'Submission Manager', 'Committee Manager', 'Program Manager', and 'CRM'. The main header shows 'PSI FOUNDATION' and '2020-1874'. The left sidebar contains navigation options: 'Main', 'Notes', 'Assigned Con...', 'Invitations', and 'Activities'. The main content area is titled 'FUNDING REQUEST SUMMARY' and includes the following sections:

- INTERNAL** (selected)
- PRINCIPAL INVESTIGATOR/ APPLICANT**
- INSTITUTION**
- MENTOR**
- NOMINATOR (DEAN/REPRESENTATIVE)**
- FUNDING REQUEST SUMMARY** (active)
- ATTACHME**

The form contains several input fields and sections:

- Start Date:** 08/01/2021
- Proposed End Date:** 11/30/2022
- Have you applied/intending to apply for other funding from another source?** (Dropdown menu set to 'No')
- Lay Summary:** Describe objectives and methodology in plain language. If funded, this description will be used to describe your project in Foundation communications. (200 words maximum). Text input: Test321
- Budget:** Please enter budget details. Button: Enter budget details

At the bottom, there are navigation buttons: < BACK, Save Draft, Submit to PSI, Delete, and NEXT >.

When this button is clicked, a window will open which will allow you enter the candidate's information. Once you have entered the information, click the 'Invite' button.

PSI FOUNDATION

Home

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Main

Notes

Assigned Contacts

2020-1874

PDF Application

PRINCIPAL INVESTIGATOR/ APPLICANT INSTITUTION MENTOR **NOMINATOR (DEAN/REPRESENTATIVE)** FUNDING REQUEST SUMMARY ATTACHMENTS

* Last Name

Researcher

Prefix	First Name	Last Name	Email	Role
Dr.	stApplicantFirstName	stApplicantLastName	est321@test321.com	Principal Investigator

+ Save Invite

* Position Institution

* Phone Number

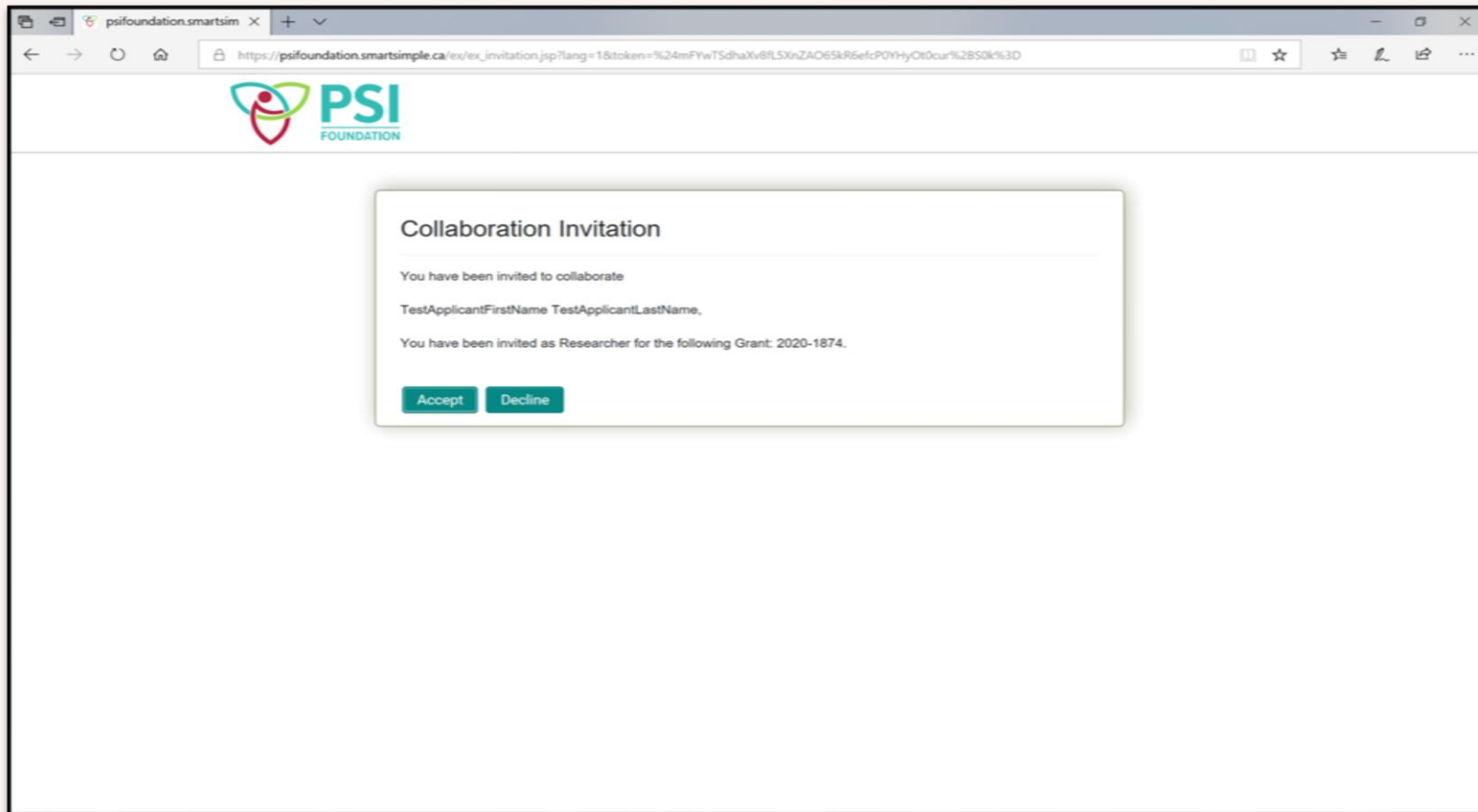
* Email Address

< BACK

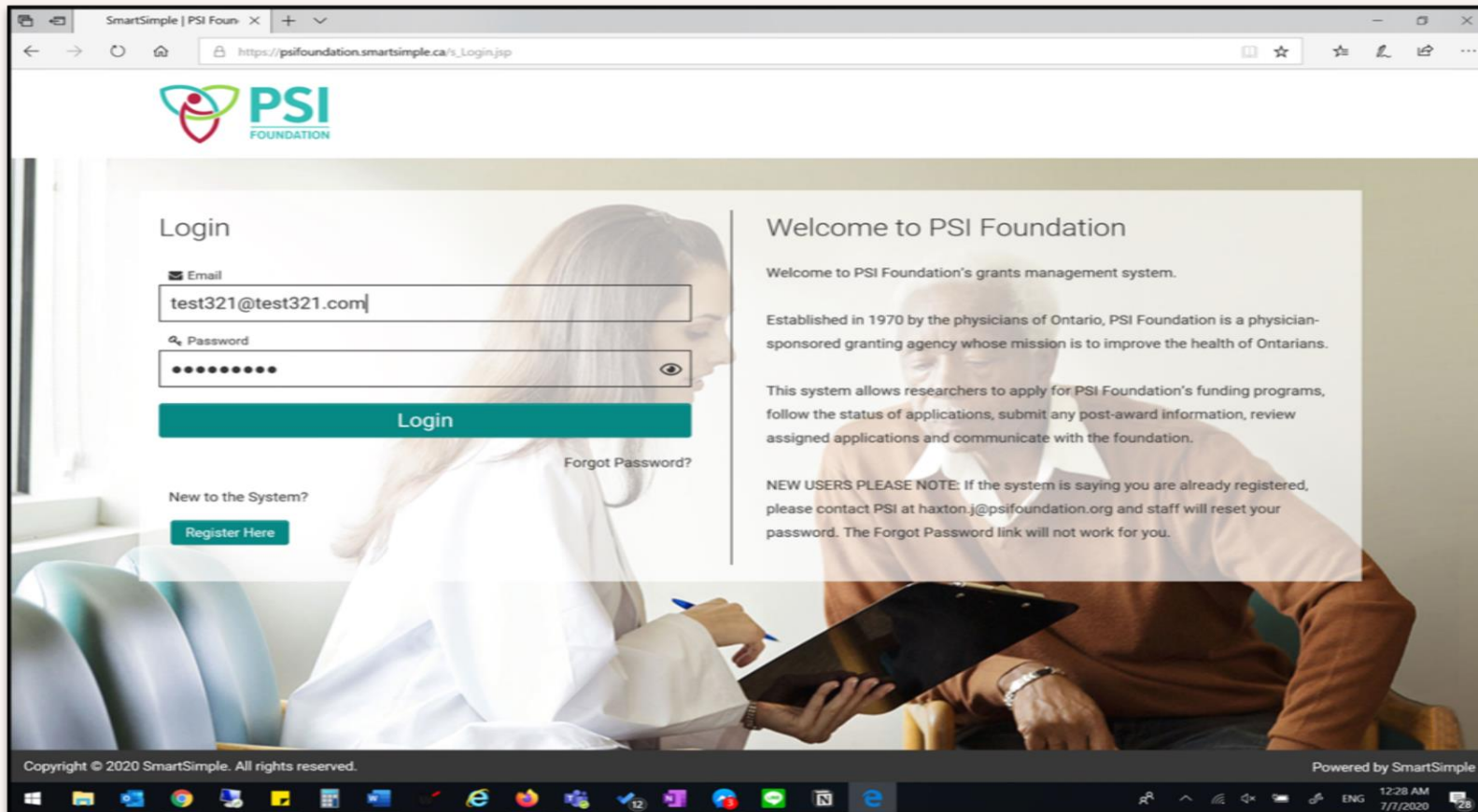
Save Draft Submit to PSI Cancel Application Invite Researcher

NEXT >

When the 'Invite' button is clicked, the system will send an email to the candidate with an invitation URL. When this URL is clicked, the candidate will be redirected to a screen as below. The candidate should click 'Accept.'



If the candidate is already a registered user in the system, then they will be to the main login screen.

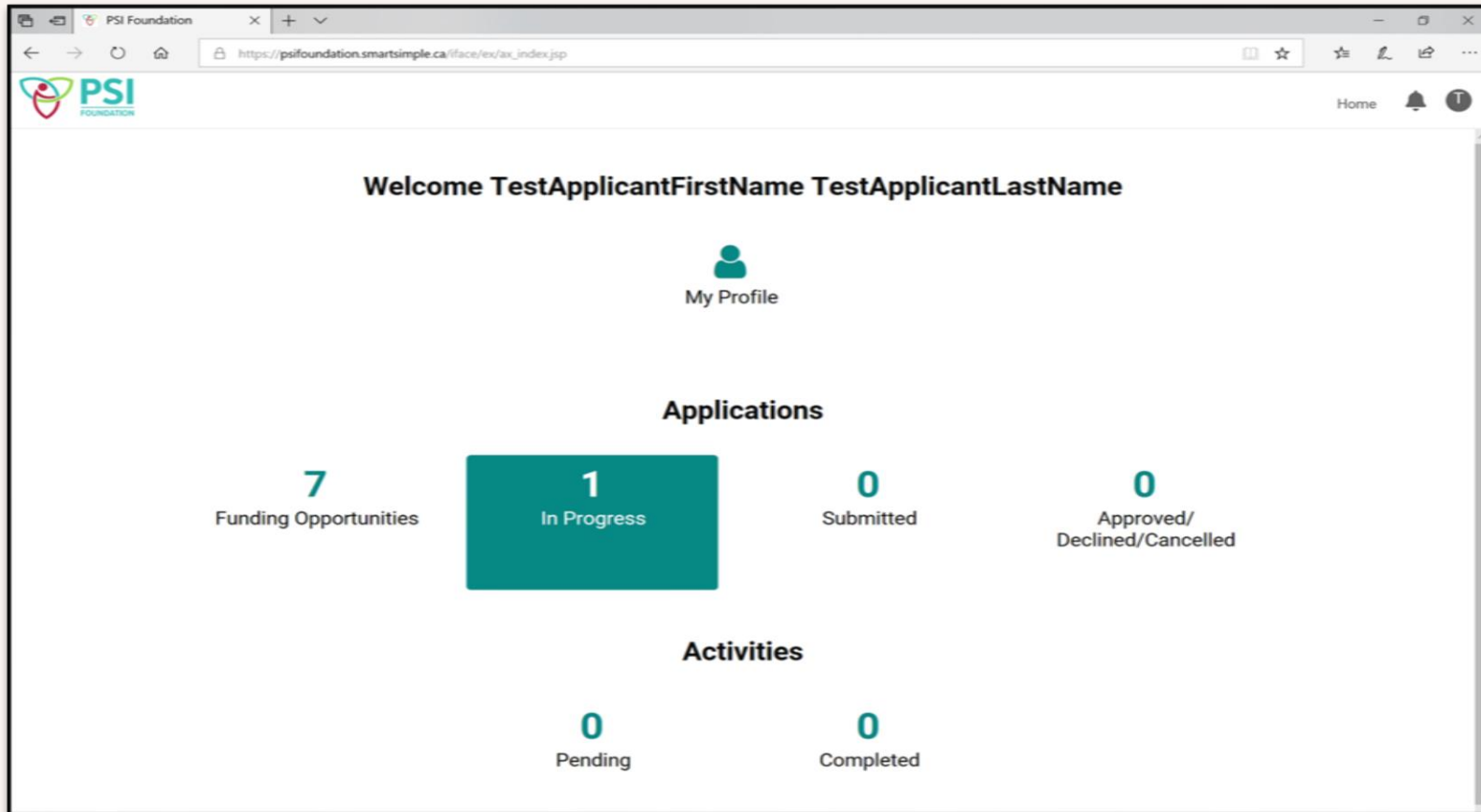


If the candidate is a first-time user, then they will be directed to complete registration. Once complete, the candidate will receive an email with password.

The screenshot shows a web browser window with the title 'Registration' and the URL https://psifoundation.smartsimple.ca/i_signup.jsp?token=XVIQC1oGYxfQhpaXvEXRFRXbE1GHVp&invitetoken=%24mFYwTSdhaXv8fL5XnZAO65kR6efcP0YHyOt0cur%2850k%3. The main content area is titled 'Contact Information' and contains the following elements:

- An information icon (i) followed by the text: **Please complete the fields below.**
- A paragraph: 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.
- A note: Required fields are marked with an asterisk.
- A note: For Last Name, First Name and Career level, please enter that of the Principal Investigator/Principal Applicant.
- Form fields: * Last Name, Middle Initial, * First Name, * Institution Name (with a help icon).
- A section titled **Gender Identification** with a note: Please note that it is NOT mandatory to complete this field. This data is used by PSI Foundation for internal purposes only.
- A dropdown menu: Please Select.
- A form field: Phone.

Once logged in, the candidate can access the invited application by clicking on In Progress.



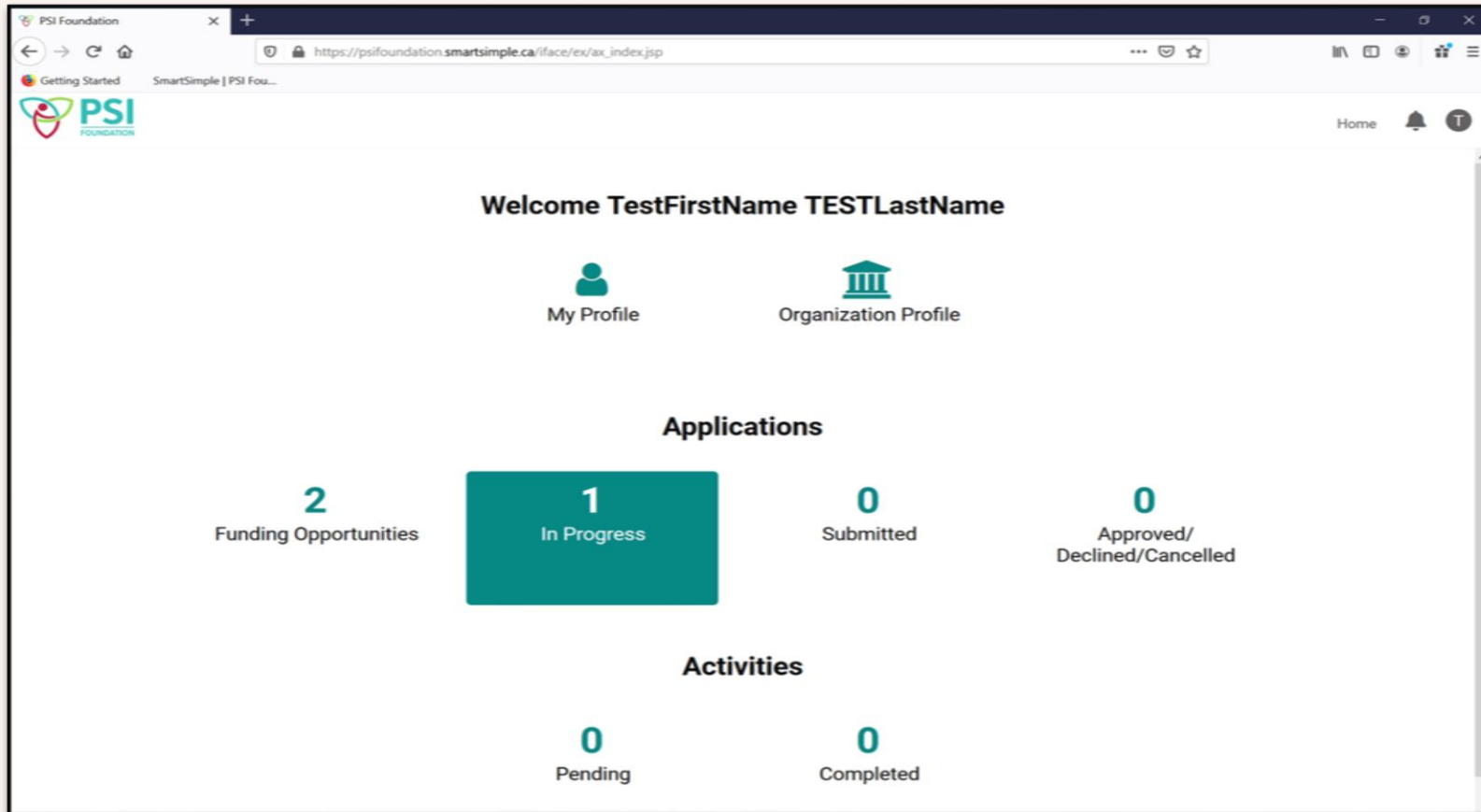
When the candidate selects the invited application, they can complete the different sections and fields on the application. Once the candidate completes all fields, then they can click the Submit to Research Office button. When this button is clicked, the University Contact will receive an email notification.

The screenshot shows a web browser window with the URL https://psifoundation.smartsimple.ca/iface/ev/ax_index.jsp. The page header includes the PSI Foundation logo and navigation links for Home, a notification bell, and a user profile icon. The main content area is titled "2020-1874" and features a "PDF Application" button. Below this is a horizontal menu with tabs: "PRINCIPAL INVESTIGATOR/ APPLICANT" (selected), "INSTITUTION", "MENTOR", "NOMINATOR (DEAN/REPRESENTATIVE)", "FUNDING REQUEST SUMMARY", and "ATTACHMENTS". The form contains several required fields, each marked with a red asterisk:

- * Principal Investigator/Applicant Last Name:
- * Principal Investigator/Applicant First Name:
- * Principal Investigator/Applicant Email Address:
- * Principal Investigator/Applicant Phone Number:
- * Principal Investigator/Applicant Mailing Address:
- * Training Program Enrolled In (E.g. PhD in Biochemistry, Clinician Investigator Program, etc.):
- * Start Date of Training Program:
- * End Date of Training Program:

At the bottom of the form, there are two buttons: "Save Draft" and "Submit to Research Office".

The University Contact can access the application by logging in to the GMS and clicking In Progress, then selecting the appropriate application.



Once the application is completed in full, you may view a summary by choosing 'PDF Application' 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 revision is required.

PSI Foundation

Getting Started SmartSimple | PSI Fou...

Home

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Main

Notes

Assigned Con... 1

2020-1874

PDF Application

PRINCIPAL INVESTIGATOR/ APPLICANT INSTITUTION MENTOR NOMINATOR (DEAN/REPRESENTATIVE) FUNDING REQUEST SUMMARY ATTACHMENTS

* Principal Investigator/Applicant Last Name
TESTApplicantLastName

* Principal Investigator/Applicant First Name
TestApplicantFirstName

* Principal Investigator/Applicant Email Address
test321@test321.com

* Principal Investigator/Applicant Phone Number
3213213213

* Principal Investigator/Applicant Mailing Address
Test321

* Training Program Enrolled In (E.g. PhD in Biochemistry, Clinician Investigator Program, etc.)
Test321

* Start Date of Training Program
mm/dd/yyyy

* End Date of Training Program

Save Draft Submit to PSI Cancel Application