



SmartSimple GMS Instruction Manual

University Contact

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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 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:

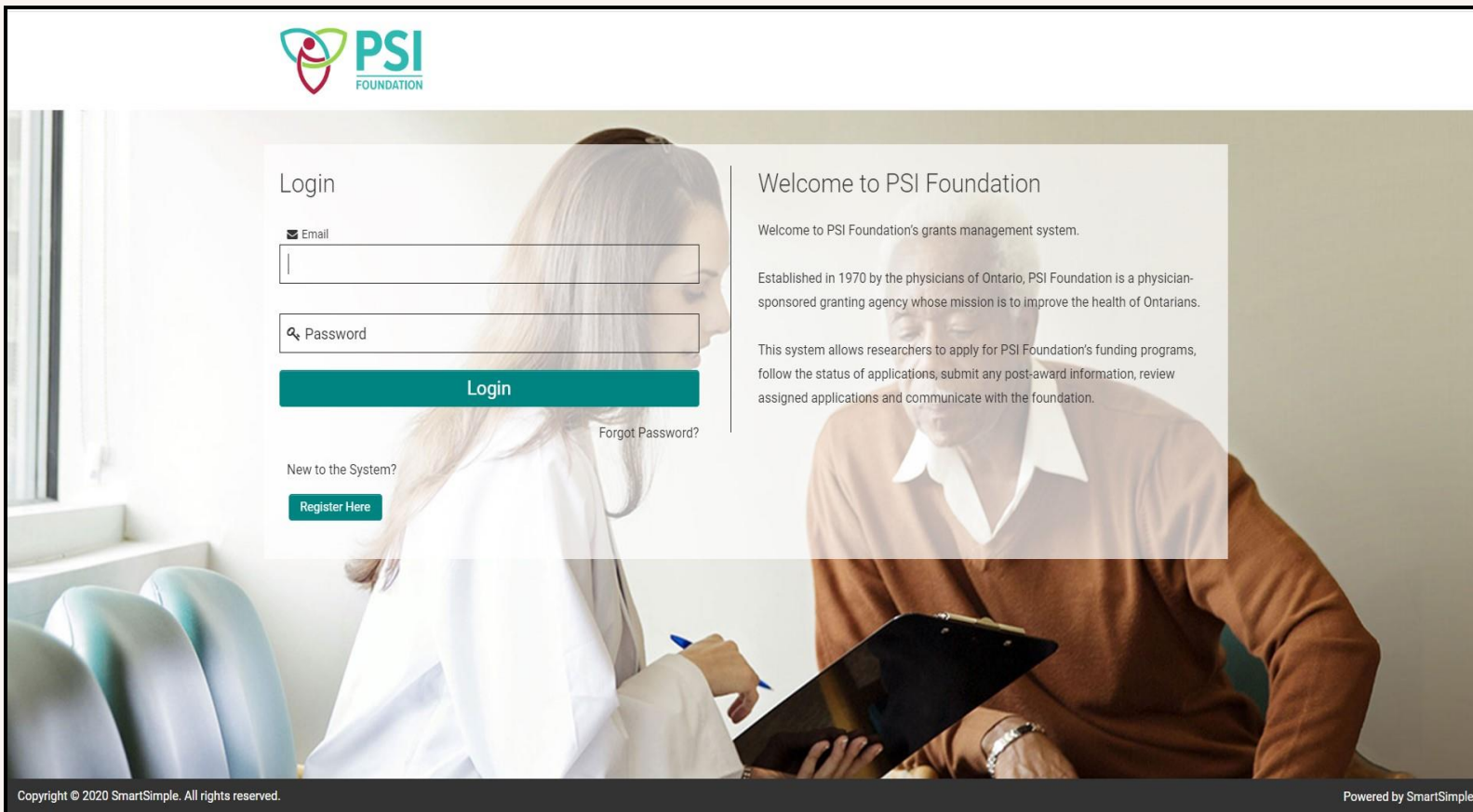
Please contact PSI staff if you encounter any issues. PSI can be reached at psif@psifoundation.org.

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.



The image shows a login screen for the PSI Foundation. The background is a photograph of a female doctor in a white lab coat and a male patient in a brown sweater, both looking at a tablet. The PSI Foundation logo is in the top left corner. The login form is on the left, and a welcome message is on the right.

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.

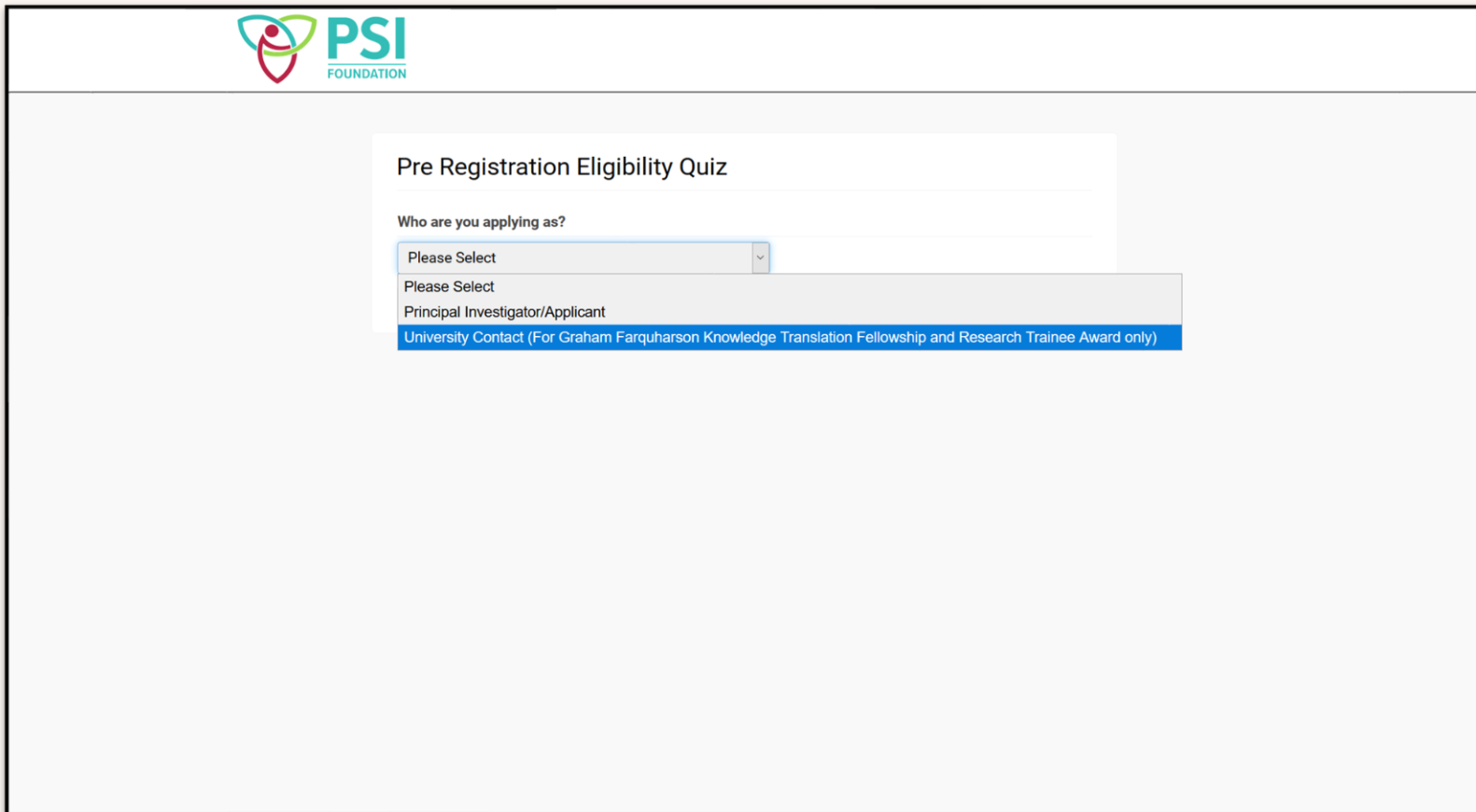
Established in 1970 by the physicians of Ontario, PSI Foundation is a physician-sponsored granting agency whose mission is to improve the health of Ontarians.

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 – 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."



The screenshot shows the PSI Foundation logo at the top left. The main content area is titled "Pre Registration Eligibility Quiz". Below the title is a question: "Who are you applying as?". There is a dropdown menu with the text "Please Select" and a downward arrow. The dropdown menu is open, showing three options: "Please Select", "Principal Investigator/Applicant", and "University Contact (For Graham Farquharson Knowledge Translation Fellowship and Research Trainee Award only)". The "University Contact" option is highlighted in blue.

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.



Registration

Organization Information

i Please complete the fields below.
Required fields are marked with an asterisk.

* Institution Name

* Charitable Registration Number

* Mailing Address

* City

* State / Province

* Zip / Postal Code

Contact Information

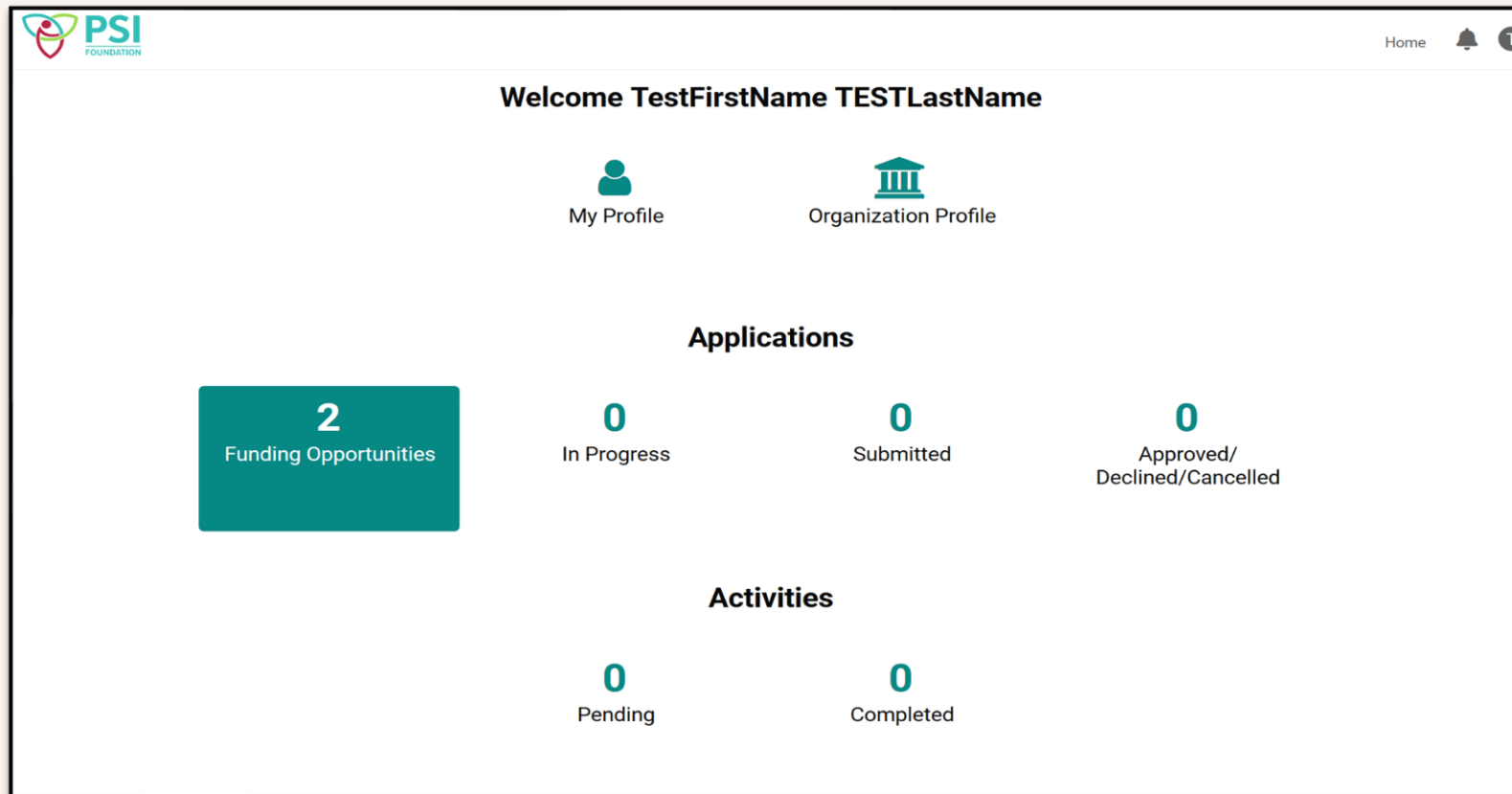
* Division/ Department

* Last Name




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.


Home

Funding Opportunities

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Application Details

PSI Graham Farquharson Knowledge Translation Fellowship

 ROUND NOT OPEN!

Research Trainee Award

[Apply Now](#)

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 PSI Foundation logo and a navigation bar. The main content area is titled "New Grant" and features a tabbed interface. The "PRINCIPAL INVESTIGATOR/ APPLICANT" tab is selected, displaying a form with the following fields:

- * 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.



Task TrackerSubmission ManagerCommittee ManagerProgram ManagerCRM

←NewOptions

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Main

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2020-1874

INTERNALPRINCIPAL INVESTIGATOR/ APPLICANTINSTITUTIONMENTORNOMINATOR (DEAN/REPRESENTATIVE)

FUNDING REQUEST SUMMARYATTACHEME

08/01/2021

* Proposed End Date

11/30/2022

* 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.

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)

Test321

Budget

* Please enter budget details

Enter budget details


BACKNEXT

Save DraftSubmit to PSIDelete

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.

Please enter budget details - Google Chrome

psifoundation.smartsimple.ca/s_viewxmlpage.jsp?fieldid=1461222&codedid=HVI2LEI8YTgiN3MijIMVFAEtIAhvBTIVH2FZUUNHY1o~&mode=0&isanno...



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i Please round to the nearest \$500 for all amounts. E.g. \$1,500.

Budget

Item Name	Description and Rationale	Category	Amount Year 1	Amount Year 2	Total Amount
<input type="text"/>	<input type="text"/>	Please Select <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<div><input data-bbox="233 867 275 899" type="button" value="+"/></div>					

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 links for Task Tracker, Submission Manager, Committee Manager, Program Manager, CRM, and user icons. The left sidebar contains a menu with Main, Notes, Assigned Con..., Invitations, and Activities. The main content area shows the application ID 2020-1874 and the 'FUNDING REQUEST SUMMARY' tab. The form includes fields for dates, a dropdown for funding sources, a text area for a lay summary, and a budget section with a 'Enter budget details' button. At the bottom, there are buttons for 'Save Draft', 'Submit to PSI', and 'Delete', along with 'BACK' and 'NEXT' navigation options.

PSI FOUNDATION

Task Tracker Submission Manager Committee Manager Program Manager CRM

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Main 2020-1874

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

08/01/2021

* Proposed End Date

11/30/2022

* 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.

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)

Test321

Budget

* Please enter budget details

Enter budget details

BACK NEXT

Save Draft Submit to PSI Delete

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.

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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

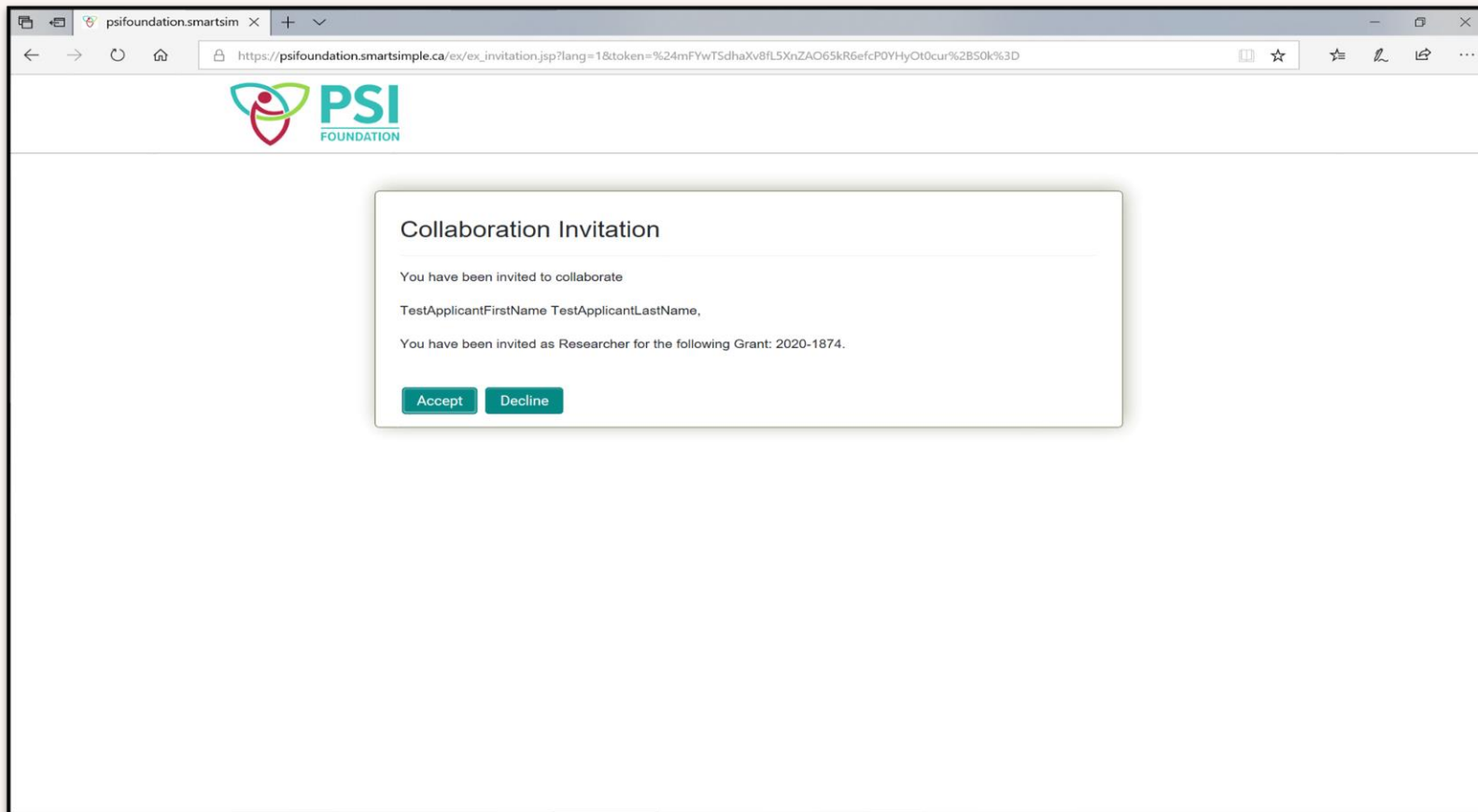
* Phone Number

* Email Address

BACK NEXT

Save Draft Submit to PSI Cancel Application Invite Researcher


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.

SmartSimple | PSI Foun x + v

https://psifoundation.smartsimple.ca/s_Login.jsp

 **PSI**
FOUNDATION

Login

Email

test321@test321.com

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.

NEW USERS PLEASE NOTE: If the system is saying you are already registered, please contact PSI at haxton.j@psifoundation.org and staff will reset your password. The Forgot Password link will not work for you.

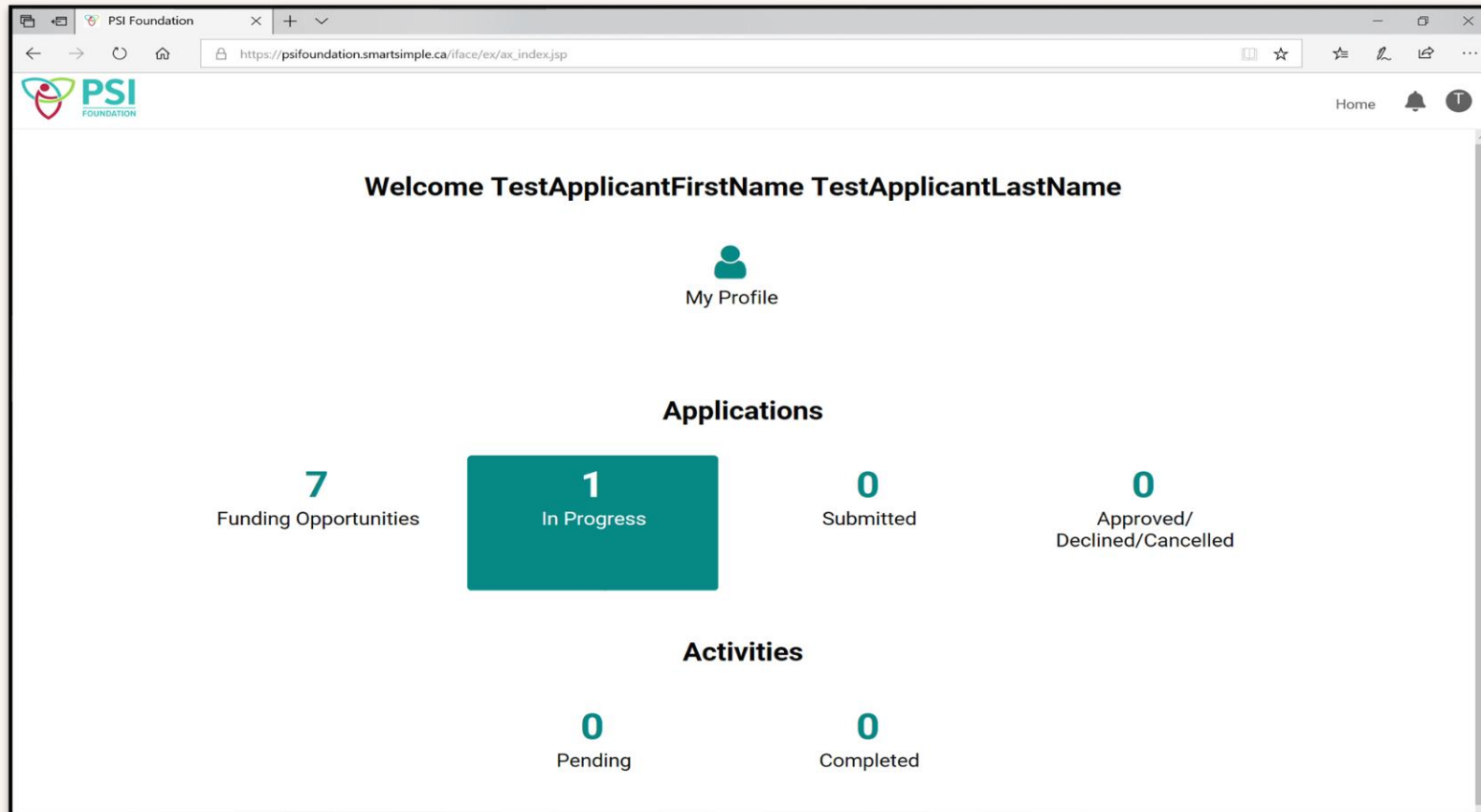
Copyright © 2020 SmartSimple. All rights reserved. Powered by SmartSimple

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'. The address bar displays the URL: https://psifoundation.smartsimple.ca/_signup.jsp?token=XVtQC1oGYlxQhpaXxBXRFRXbE1GHVp&invitetoken=%24mFYwTSdhaXv8fL5XnZAO65kR6efcP0YHyOt0cur%2B50k%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.'
- Four text input fields with labels: '* Last Name', 'Middle Initial', '* First Name', and '* 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 with the text 'Please Select' and a downward arrow.
- A text input field labeled '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 PSI Foundation logo and navigation links. The main content area displays the application ID '2020-1874' and a 'PDF Application' button. Below this is a tabbed interface with the 'PRINCIPAL INVESTIGATOR/ APPLICANT' tab selected. The form contains several required fields marked with an asterisk: Principal Investigator/Applicant Last Name, First Name, Email Address, Phone Number, Mailing Address, Training Program Enrolled In (with an example: 'PhD in Biochemistry, Clinician Investigator Program, etc.'), Start Date of Training Program (with a date picker), and End Date of Training Program. At the bottom right, there are two buttons: 'Save Draft' and 'Submit to Research Office'.

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Main

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2020-1874

PDF Application

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

* 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.)

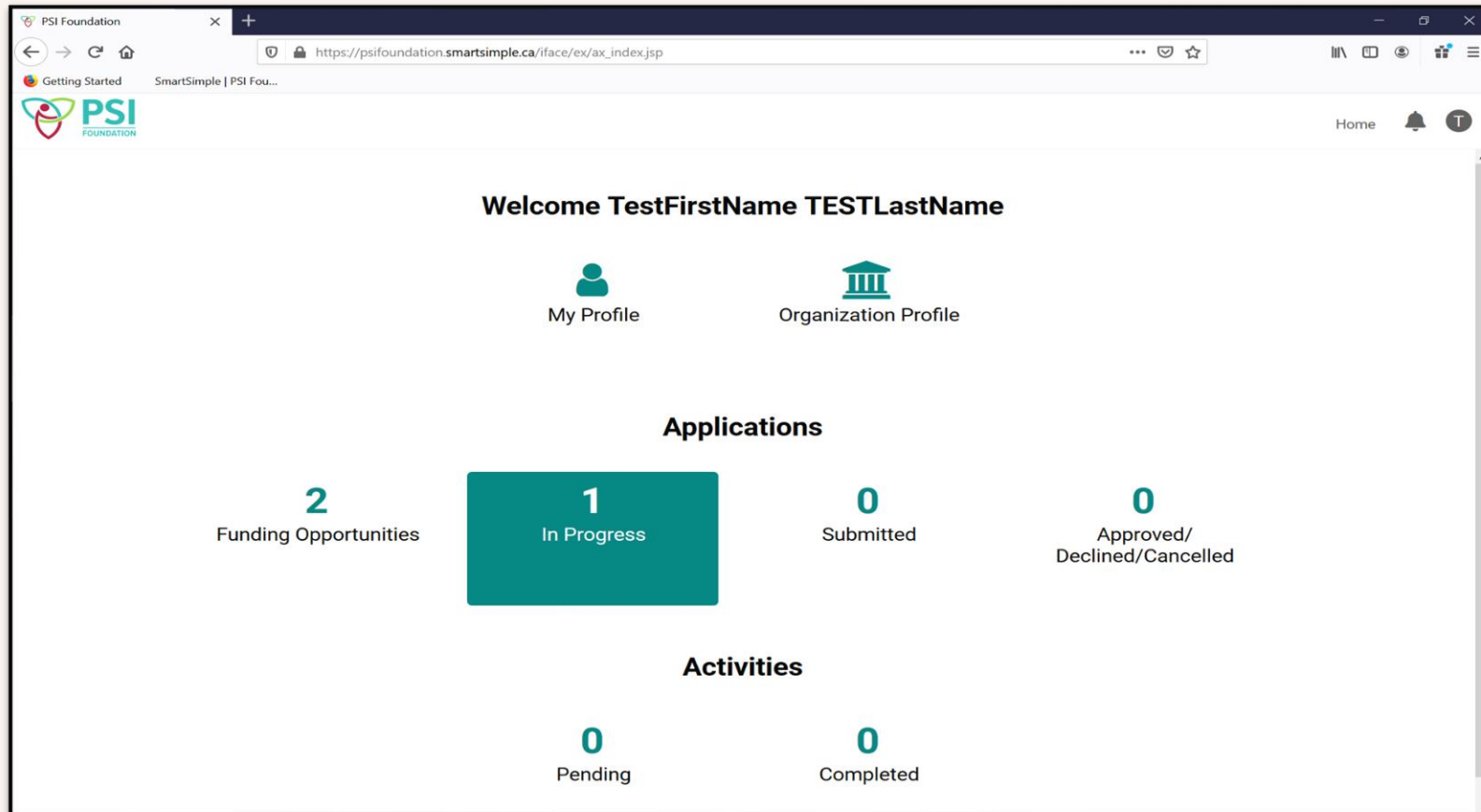
* Start Date of Training Program

mm/dd/yyyy

* End Date of Training Program

Save Draft 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.



If edits need to be made by the candidate after they click on the 'Submit to Research Office' button, then University Contact can click on the 'Return to Draft Status' button at the bottom to change the application status back to 'Draft'. This will enable the candidate to edit the application form.

Note: Clicking the 'Return to Draft Status' button will not trigger any email notification. University Contact will have to let the candidate know by email or another way that the status has been changed back to 'Draft'.

The screenshot shows the PSI Foundation application form for the year 2020-1874. The form is titled '2020-1874' and includes a 'PDF Application' button. The form is divided into sections: 'PRINCIPAL INVESTIGATOR/ APPLICANT', 'INSTITUTION', 'MENTOR', 'NOMINATOR (DEAN/REPRESENTATIVE)', 'FUNDING REQUEST SUMMARY', and 'ATTACHMENTS'. The 'PRINCIPAL INVESTIGATOR/ APPLICANT' section contains the following fields:

- * 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: 07/28/2021
- * End Date of Training Program: (empty)

At the bottom of the form, there are four buttons: 'Save Draft', 'Submit to PSI', 'Cancel Application', and 'Return to Draft Status'. A 'NEXT >' button is also visible on the right side of the form.

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.

The screenshot shows a web browser window with the URL https://psifoundation.smartsimple.ca/iface/ex/ax_index.jsp. The page is titled "PSI Foundation" and "SmartSimple | PSI Fou...". The main content area is titled "2020-1874" and features a "PDF Application" button. Below this, there are tabs for "PRINCIPAL INVESTIGATOR/ APPLICANT", "INSTITUTION", "MENTOR", "NOMINATOR (DEAN/REPRESENTATIVE)", "FUNDING REQUEST SUMMARY", and "ATTACHMENTS". The "PRINCIPAL INVESTIGATOR/ APPLICANT" tab is active, showing a form with the following fields:

- * 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: (field is partially visible)

At the bottom of the form, there are three buttons: "Save Draft", "Submit to PSI", and "Cancel Application".