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.
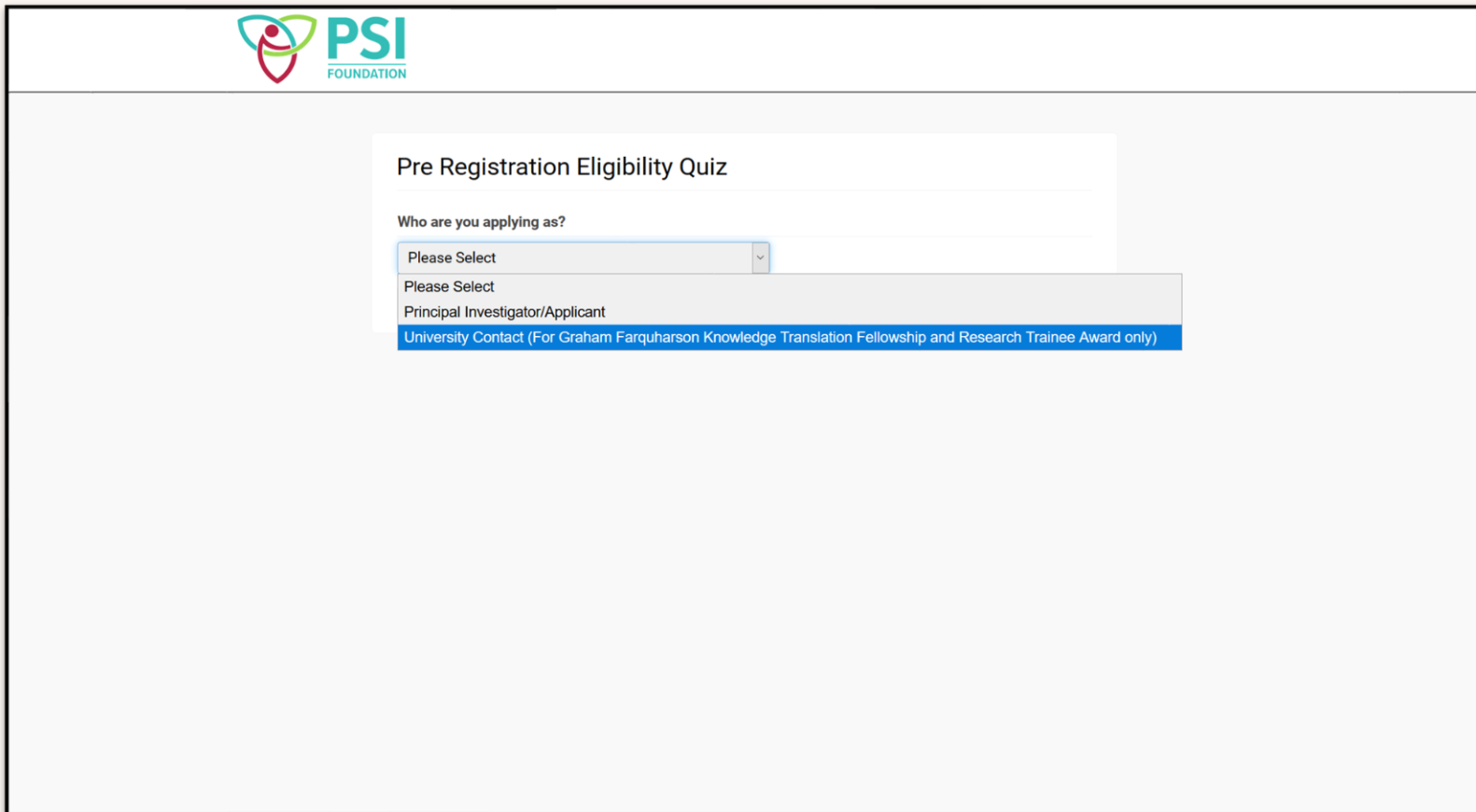
Please Note: **For PSI Research Trainee Award, applications must be submitted by a University Contact (i.e. a representative from the medical university), not the candidate. A University Contact from each medical university is required to register and create an account in GMS, start the online application, 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.**
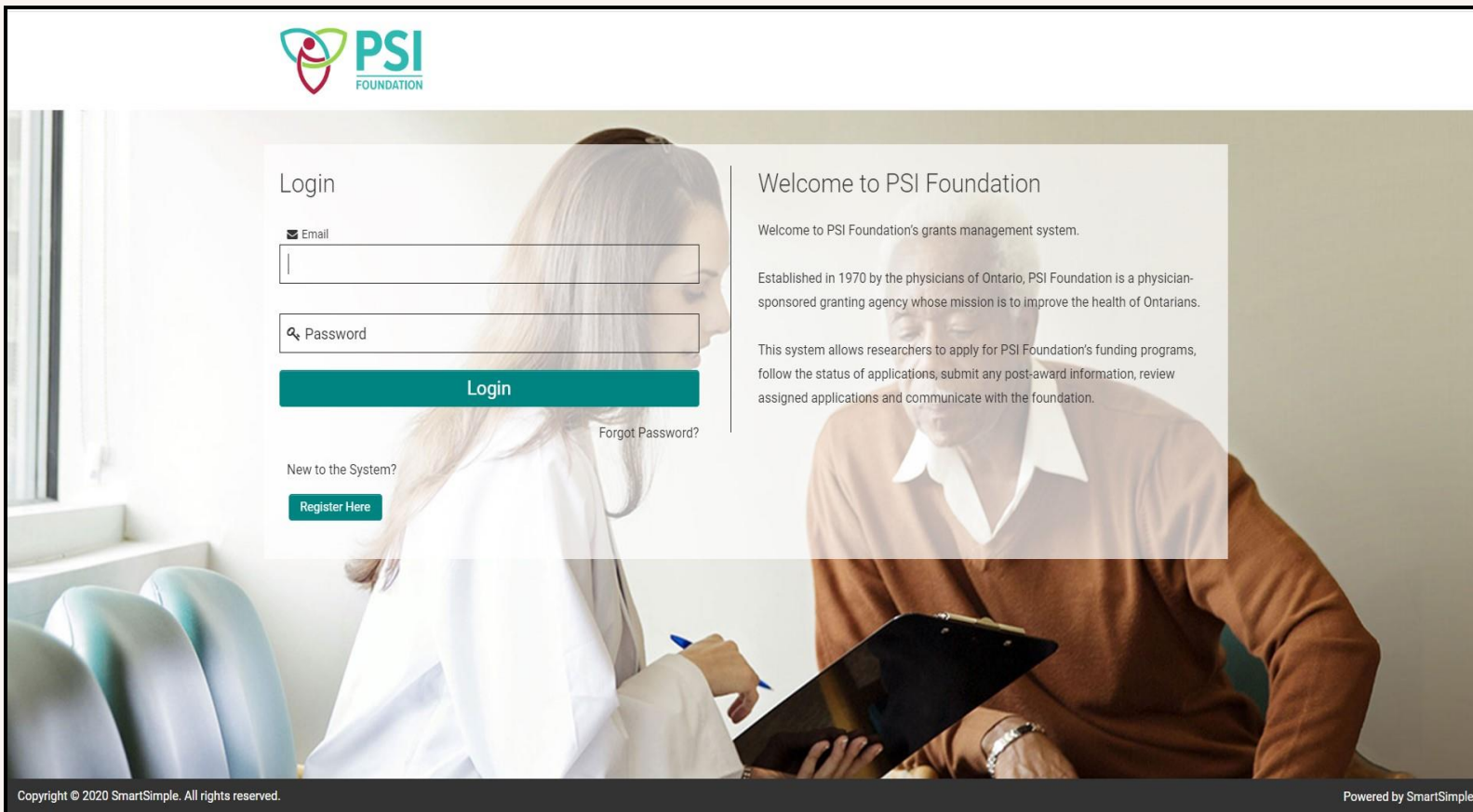
Support:
Please contact PSI staff if you encounter any issues. PSI can be reached at psif@psifoundation.org.

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.

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."

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.

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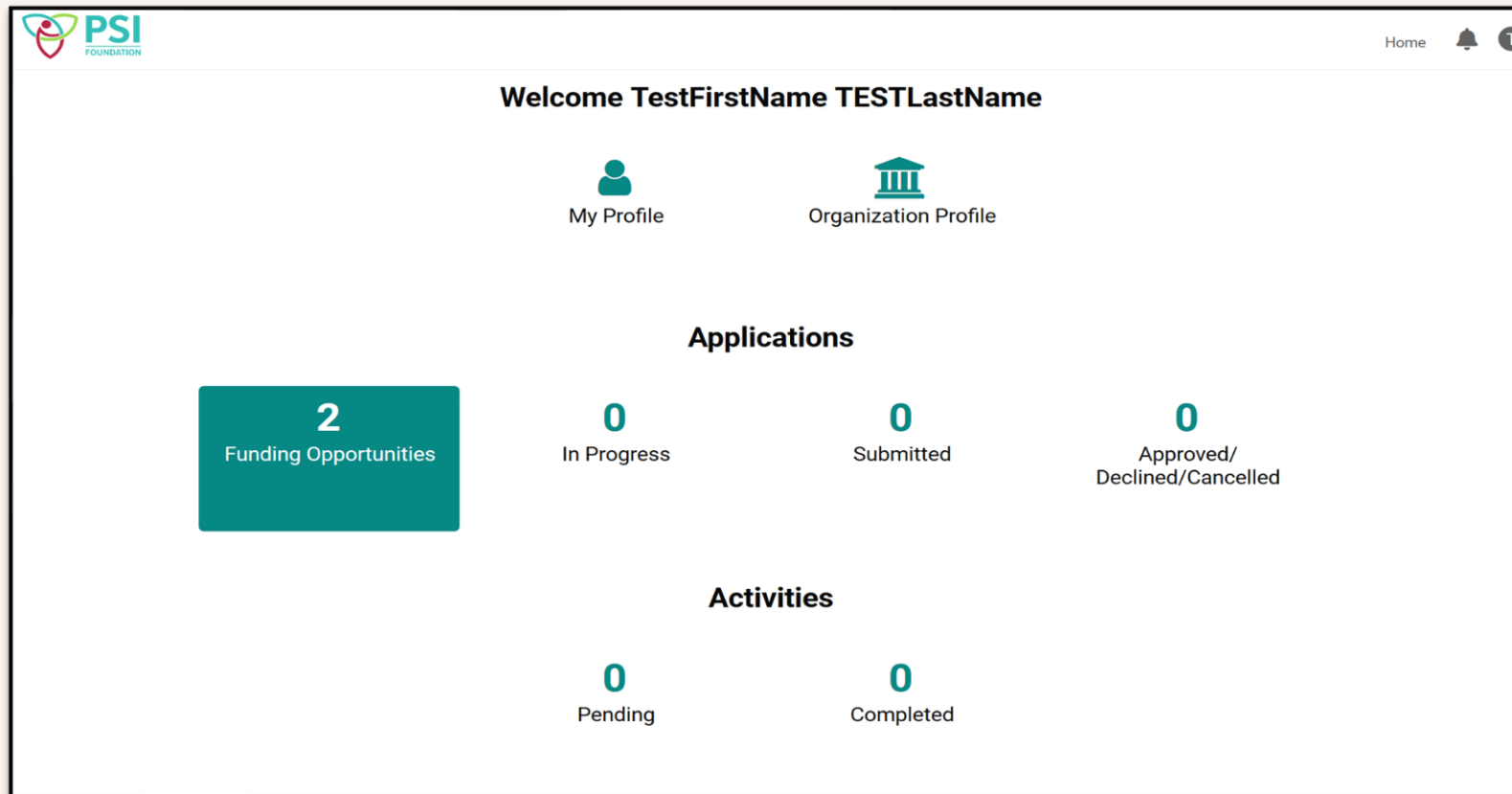
To view available awards, please click on Funding Opportunities. A list of funding options will appear, from which you can select the appropriate one to apply for.

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.

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.

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.

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.

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.

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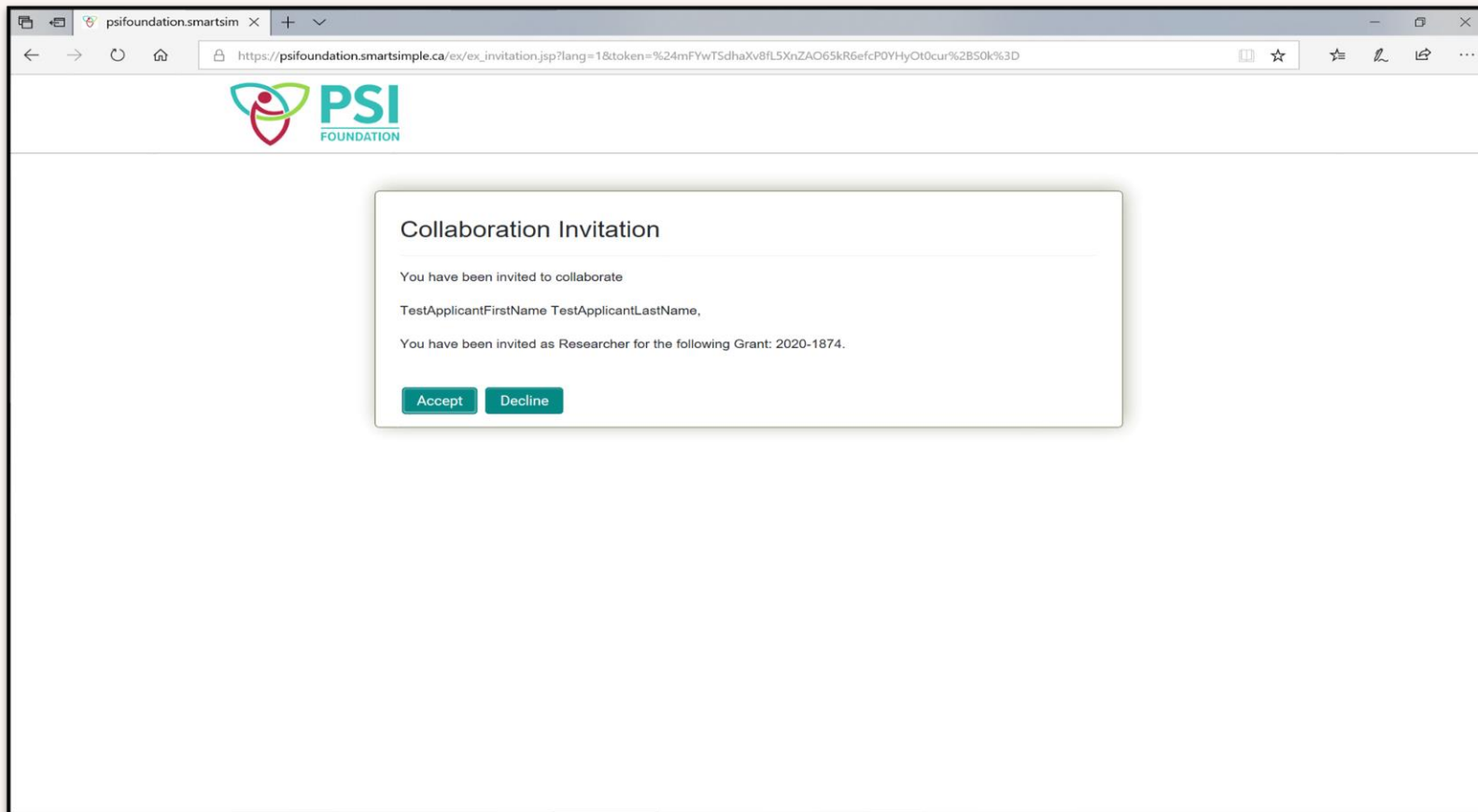
If the candidate is already a registered user in the system, then they will be to the main login screen.

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.

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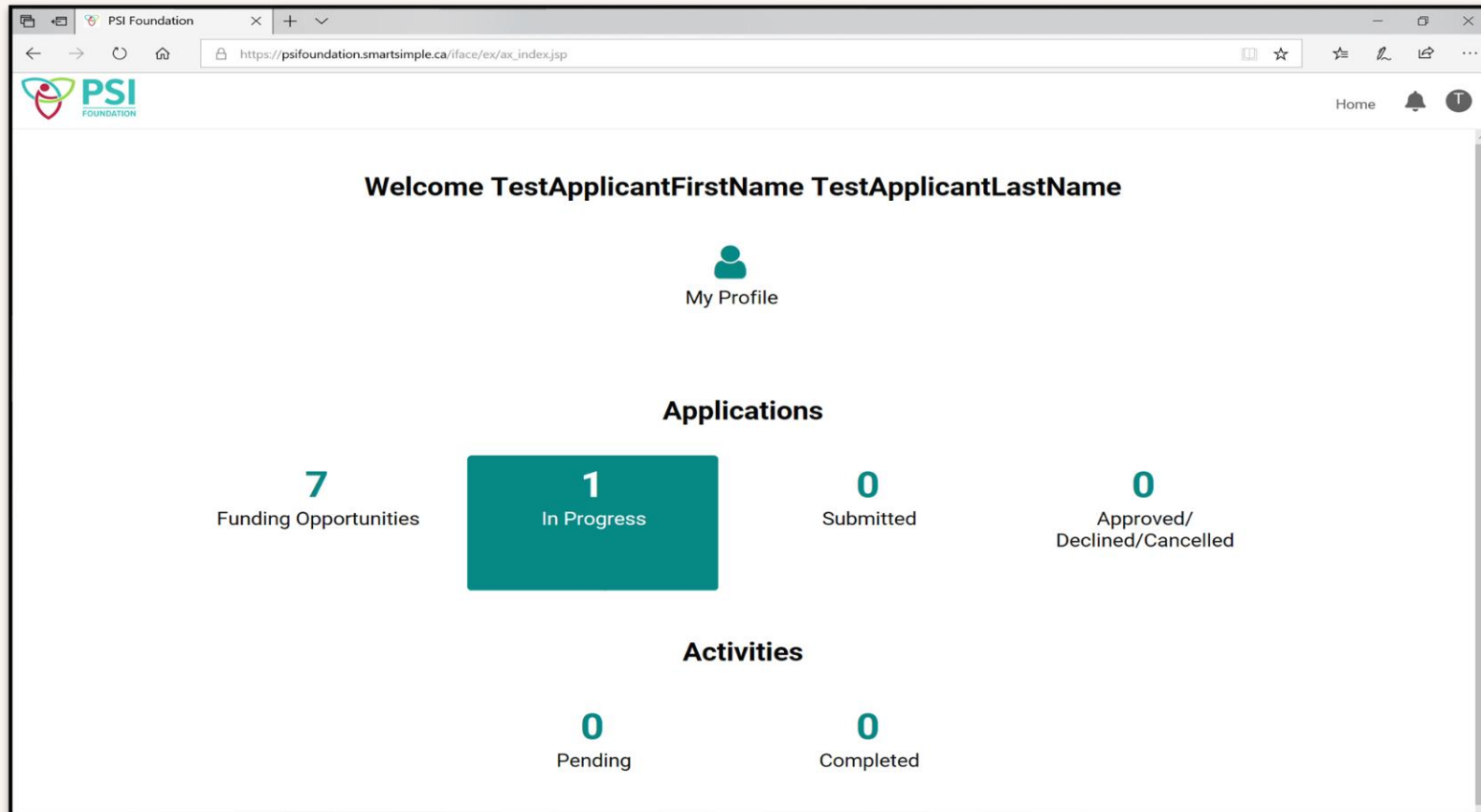
When the candidate selects the invited application, they can complete the different sections and fields on the application. Once the candidate completes all fields, then they can click the Submit to Research Office button. When this button is clicked, the University Contact will receive an email notification.

The University Contact can access the application by logging in to the GMS and clicking In Progress, then selecting the appropriate application.
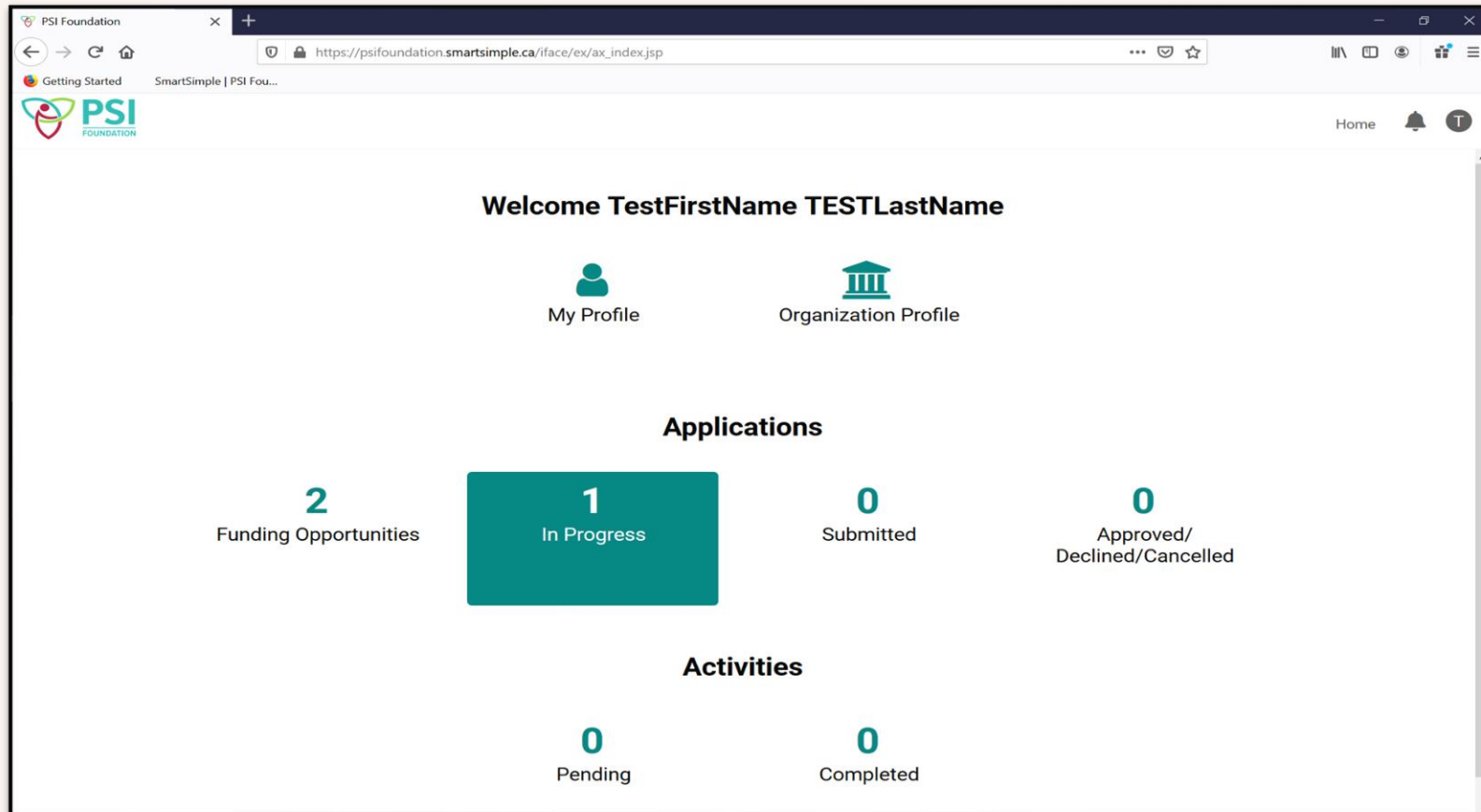
If edits need to be made by the candidate after they click on the 'Submit to Research Office' button, then University Contact can click on the 'Return to Draft Status' button at the bottom to change the application status back to 'Draft'. This will enable the candidate to edit the application form.

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'.

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.