

SmartSimple User Manual Applicant - Applying for a Grant

Last updated 2 November 2022

About this User Manual

Who this Manual is for

This is an Applicant manual. It will help you to navigate SmartSimple, the system we use to administer grants, and submit your application/s.

What it will help you do

This manual will take you through the process of applying for a grant with Maudsley Charity.

The grants team at Maudsley Charity will register you with SmartSimple so you can create, submit and track your application.

You will receive an email from the Charity with your SmartSimple username and password.

To complete your application, you will need the following:

- Call documents
- Project details and summary
- Budget summary and spreadsheet
- Project plan documentation
- Any relevant supporting documentation.

Key

The symbols below are used in this document.



Important note

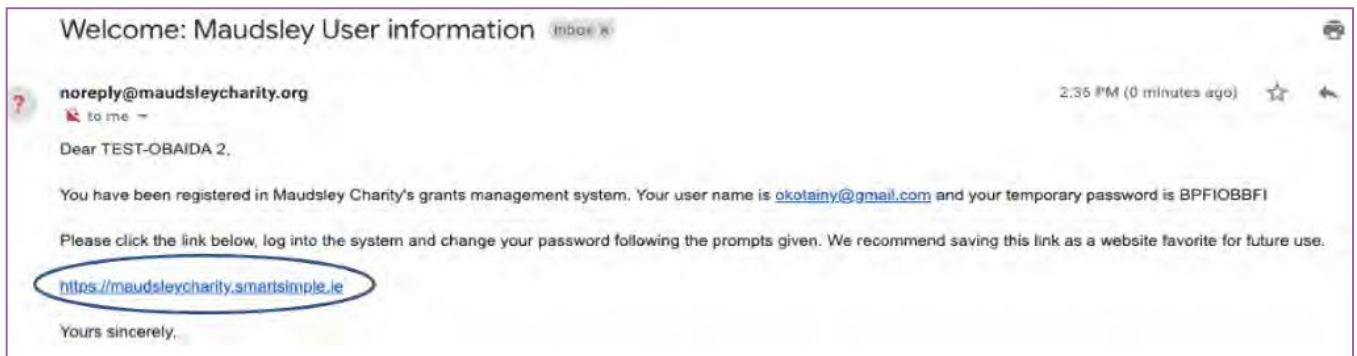


Email triggered in workflow.

Apply for a grant with Maudsley Charity

1. Login to your SmartSimple account for the first time

- Open the Welcome email from the Charity, click on the link in the email to take you to the SmartSimple website.



- Enter the username and password from the Maudsley Charity email. **Login.**

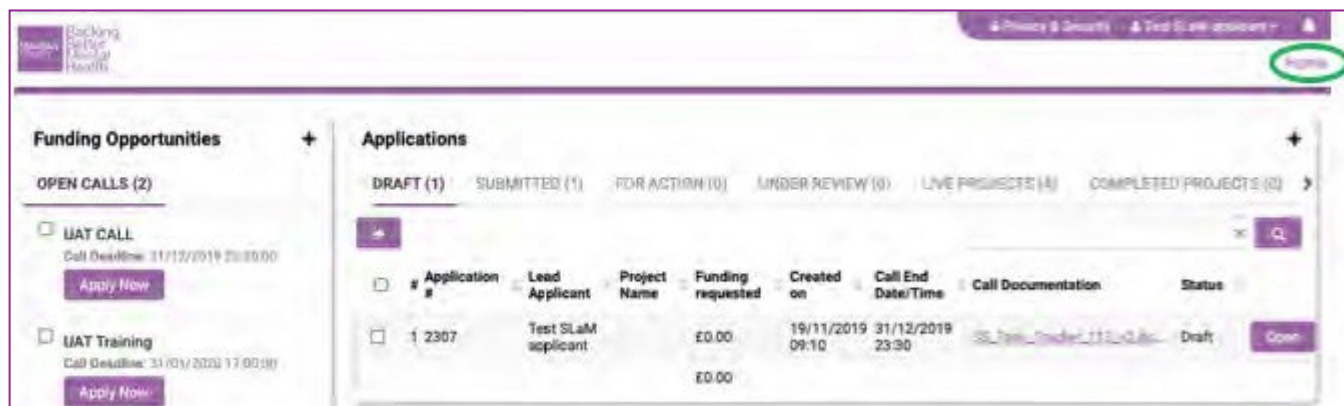
A screenshot of the "Welcome to the Maudsley Charity Grants Management system" page. The page has a header with the title and a sub-header "Login". Below the header, there is a message: "This is the portal for all online communications regarding the Maudsley Charity's grants schemes, including the application process, review and assessment, progress reporting and payments. For assistance using this portal, please contact grants@maudsleycharity.org." On the right side, there is a login form with fields for "Email:" (containing okotainy@gmail.com) and "Password:" (containing a masked password). Below the password field is a "Login" button. There are also links for "Forgot Password?" and "Privacy & Security".

① After logging in with your temporary password, you will be prompted to create a new password.

- Enter a new password. **Submit.**

A screenshot of the "Change Password" form. It has three input fields: "Current Password:", "New Password:", and "Confirm New Password:". Below these fields is a "Policy:" section with the following text: "Password must be a minimum of 6 characters", "Password must contain at least one of each of the following: Letters and Numbers", and "Password must only contain: Letters and Numbers". At the bottom of the form are two buttons: "Submit" and "Cancel".

After logging in, ensure you are on the **Home** page of your SmartSimple portal (see below). This may be named differently to the picture i.e. named for the system role you have e.g. Applicant or Reviewer or Panel Member.



① Click the **Home** button in the top right corner to return to this page at any time.

① See Appendix 1 of this document for a description of the application status tabs: Draft, Submitted, For Action, Under Review, Live Projects, and Completed Projects.

2. Begin a new application

1. Under **Funding Opportunities > Open Calls**, click **Apply Now** for the Call you want to submit an application to. ⓘ Every time you click Apply Now, you will generate a new application.

The screenshot shows the 'Funding Opportunities' section on the left with two open calls: 'UAT CALL' and 'UAT Training'. The 'UAT Training' call has a green circle around its 'Apply Now' button. On the right, the 'Applications' section shows a table of applications. The first application is highlighted with a green circle around its 'Open' button.

Application #	Lead Applicant	Project Name	Funding requested	Created on	Call End Date/Time	Call Documentation	Status
1 2307	Test SLAM applicant		£0.00	19/11/2019 09:10	31/12/2019 23:30	SS_Test_Training_UAT_Application	Draft

2. You will see a new application page, similar to below.

The screenshot shows the application form for application 2323. The application type is 'Standard Process'. The call documentation is 'UAT_Test_Call_Application_Form'. The application reference is '2323'. The status is 'Draft'. The applicant details are as follows:

First Name: Test
Surname: SLAM applicant
Organisation: South London and Maudsley NHS Foundation Trust
Address: Bethlem Royal Hospital, Monks Orchard Road, Beckenham, London, SE23 3BX
Job Title: [Empty]
Email: test@slam.nhs.uk
Telephone number: 02032286000

* Please select the internal Operational Directorate to endorse your project: CAMHS

Co-Applicant

If the co-applicant is not a current user of Maudsley Charity's Grants Management System, please contact grants@maudslscharity.org.

First Name: [Empty] Last Name: [Empty] Email: [Empty] Company: [Empty] Role: [Empty]

No Results Found

Save Draft Submit Discard Application

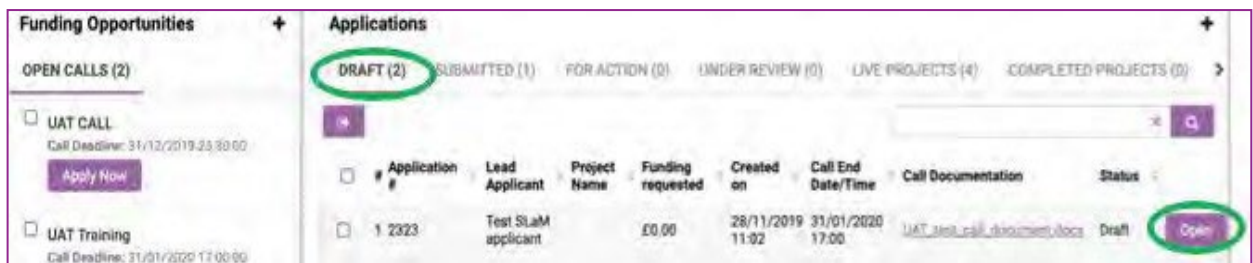
① Your new application has a system-generated application reference number (top left). This is used to identify your application in SmartSimple.

① Note there are three tabs: Applicant Details, Project Details, and Questionnaire.

① **IMPORTANT: Please click Save Draft frequently.** For security reasons, your SmartSimple account will time out and log you off after a period of inactivity (“inactivity” includes reading and typing). If you haven’t clicked Save Draft, you will lose any changes made.

① The status of your application is In Draft.

① On your Home page, you can find it under applications in the Draft tab. On the right side, click Open to open your application.



3. **Click the link to download the Call Documentation.**

- Read and ensure you understand the Call instructions and guides before you begin your application. If you are unsure, please contact the Charity to discuss your application.
- Tick the box** to confirm you have read and understand the instructions provided.



4. Complete the **Applicant Details**.
 - a. Check your details are correct – if not, please contact the Charity
 - b. Enter your **Job Title**
 - c. **Select** the internal Operational Directorate to endorse your project.

2323

Application Type: Standard Process

Call Documentation: UAT_test_call_document_data

* I have read and understand the instructions provided: ☒ Yes

Application Reference: 2323

Status: Draft

APPLICANT DETAILS PROJECT DETAILS QUESTIONNAIRE

First Name: Test

Surname: SLAM applicant

Organisation: South London and Maudsley NHS Foundation Trust

Address: Bethlem Royal Hospital
Monks Orchard Road, Beckenham
London
BR3 3BX

Job Title: Deputy Medical Director

Email: test@slam.nhs.uk

Telephone number: 02032285000

* Please select the internal Operational Directorate to endorse your project:

- CAMHS**
- Croydon & BDP
- Lambeth
- Lewisham
- Nursing
- Psychological Medicine and Older Adults
- Southwest, Central Acute and Addictions
- KCU/OPPN
- Corporate

Co-Applicant

If the co-applicant is not a c... please contact: grants@maudsleycharity.org

5. You have the option of adding a Co-Applicant.
 - ① The Applicant and Co-Applicant can collaborate on an application up till the application is submitted. After the application has been submitted, only the lead Applicant will have access to make changes. The Co-Applicant will still be able to access and view the application but will be unable to edit it. Co-Applicants can edit if there is a revision requested.

- a. To add a Co-Applicant, click the purple **binoculars**

Co-Applicant

If the co-applicant is not a current user of Maudsley Charity's Grants Management System, please contact grants@maudsleycharity.org.

First Name	Last Name	Email	Company	Role
No Results Found				

Co-Applicant Authority

☐ I confirm I know the co-applicant I am adding, and authorise Maudsley Charity to contact them by email to facilitate collaboration on this application.

- b. In the text box, enter the name of the person you wish to add as a Co-Applicant
- c. **Click** the search button
- d. **Check** the box of the person you wish to add
- e. **OK.**

i If the co-applicant is not a current user of Maudsley Charity's grants administration system, they will not appear in the list. Please contact grants@maudsleycharity.org.

- f. Click **Add (+)** to add the Co-Applicant.

- g. The Co-Applicant has been added.

i To remove Co-Applicant, check tick box next to the name. Click the purple **Remove (-)** button that will appear above the list of names.

- h. **Click the tick box** to confirm you know the co-applicant you are adding, and to authorise Maudsley Charity to contact them by email.

6. Save Draft.

3. Enter project details

1. To enter your project details, click **Project Details** tab. Or click the **Next >** button at the bottom right to move between the tabs.

The screenshot shows the 'Project Details' tab selected in the top navigation bar. The form contains several sections: 'Project Title' with a text input field and a word count of 18 words left; 'Project Summary' with a text input field and a word count of 99 words left; 'Total funding requested' with a text input field containing '200000.00'; 'Upload detailed budget spreadsheet' with a file upload button and a table of uploaded files; 'Proposed Start Date' with a date input field set to '02/02/2020'; 'Project duration (months)' with a dropdown menu set to '18'; and 'Proposed End Date' with a date input field set to '02/06/2021'. At the bottom right, there is a 'NEXT >' button circled in green.

2. Complete all project detail fields and upload any required documents.
① You can download, delete or rename an uploaded document. Select the document and then the relevant purple button. Or use the 3 dot button on the far right of the uploaded document.

This close-up screenshot focuses on the 'Upload detailed budget spreadsheet' section. It shows a table with columns for 'File Name', 'Size', and 'Date'. A file named 'Text.docx' is listed. To the left of the file name is a checkmark icon. To the right of the file name are three purple buttons: a download icon, a delete icon, and a rename icon. A green circle highlights the rename icon. At the bottom right, there is a 'NEXT >' button circled in green.

3. **Save Draft** frequently.
① Proposed End Date will automatically update once you have entered the Proposed Start Date and Project duration and clicked Save Draft.

4. Enter Questionnaire details

1. To enter Questionnaire details, click **Questionnaire** tab. Or click the **Next >** button at the bottom right to move between the tabs.

The screenshot displays the 'Questionnaire' tab for application 2323. At the top, the application type is 'Standard Process' and the call documentation is 'OAT_Joint-NSL_Application.docx'. A confirmation message states 'I have read and understand the instructions provided:' with a 'Yes' button. The application reference is 2323 and the status is 'Draft'. Below this is a 'Preview PDF' button. The navigation tabs are 'APPLICANT DETAILS', 'PROJECT DETAILS', and 'QUESTIONNAIRE', with the latter being selected and circled in green. The 'Questionnaire' section contains three questions: 'When will your project start?' with the answer '03/02/2020', 'Where will the project take place?' with the answer 'Everywhere', and 'Who will your project impact?' with the answer 'Everyone'. Below the questions is a section for uploading documentation, titled 'Please upload any relevant documentation to support your application'. It includes a table with columns for 'File Name', 'Size', and 'Date'. One file, 'Test.docx', is listed with a size of '11.5 KB' and a date of '29/11/2019 09:32'. At the bottom, there are buttons for 'Save Draft', 'Submit', and 'Discard Application', along with a 'Total Files: 1' indicator.

2323

Application Type: Standard Process

Call Documentation: OAT_Joint-NSL_Application.docx

I have read and understand the instructions provided: Yes

Application Reference: 2323

Status: Draft

Preview PDF

APPLICANT DETAILS PROJECT DETAILS **QUESTIONNAIRE**

Questionnaire

When will your project start?
03/02/2020

Where will the project take place?
Everywhere

Who will your project impact?
Everyone

Please upload any relevant documentation to support your application

File Name	Size	Date
Test.docx	11.5 KB	29/11/2019 09:32

Total Files: 1

Save Draft Submit Discard Application

2. Complete all Questionnaire fields and upload any required documents.
① "Please upload any relevant supporting documentation" allows you to upload any extra documents relating to your application.
3. **Save Draft.**

5. Submit your application

1. Please review your application and all the information you have provided.
2. If you are satisfied with your application, click **Submit**.
 - ① Once your application has been submitted, you will not be able to make further changes to your application. Once submitted, any Co-Applicants will not be able to edit the application.

The screenshot displays the '2323' application form. At the top, it shows 'Application Type: Standard Process' and 'Call Documentation: UAT_test_call_document.docx'. A confirmation box states '* I have read and understand the instructions provided:' with a checked 'Yes' option. The 'Application Reference' is 2323 and the 'Status' is Draft. A 'Preview PDF' button is visible. Below this are tabs for 'APPLICANT DETAILS', 'PROJECT DETAILS', and 'QUESTIONNAIRE'. The 'APPLICANT DETAILS' tab is active, showing fields for First Name (Test), Surname (SLaM applicant), Organisation (South London and Maudsley NHS Foundation Trust), Address (Bethlem Royal Hospital, Monks Orchard Road, Beckenham, London, BR3 3BX), Job Title (Deputy director), Email (test@slam.nhs.uk), and Telephone number (02032286000). A dropdown menu for 'Please select the internal Operational Directorate to endorse your project:' is set to 'CAMHS'. Below this is the 'Co-Applicant' section with a note about contacting grants@maudslaycharity.org if not a current user. At the bottom, there are buttons for 'Save Draft', 'Submit' (highlighted with a red circle), and 'Discard Application'.

- ① If you have missed any required information, you will receive an error message informing you of which information needs to be provided. Please enter this. Save Draft. Submit.

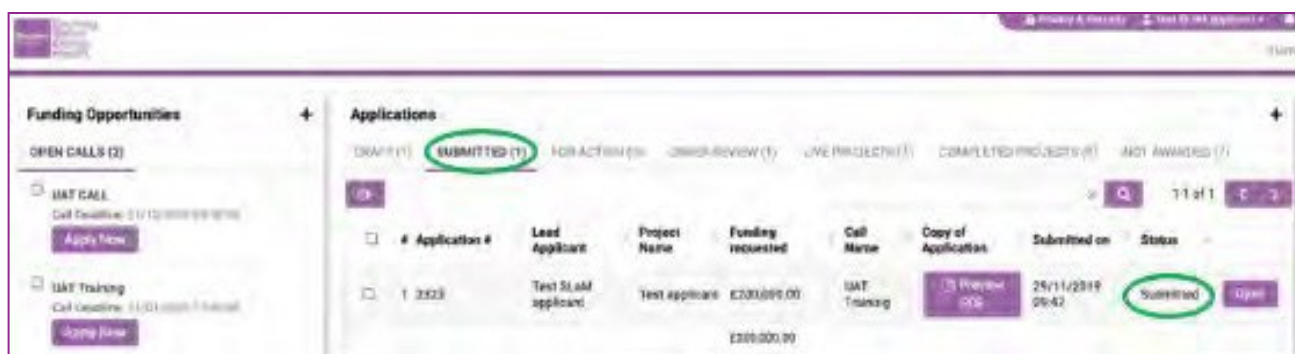
3. If the application has been successfully submitted, you will see the following message.



i The status of your application is Submitted.

4. In the top right corner, click **Home** to return to the main page of your portal.

5. Your application is now visible under the **Submitted** tab.



Your application is now with the Charity and under consideration.

From: grants@maudsleycharity.org

CC:

To: test@slam.nhs.uk

BCC:

Subject: Maudsley Charity application 2323

Created: 29 November 2019 09:47

Dear Test,

Thank you for applying for a grant from Maudsley Charity.

We will review and assess your application and let you know the outcome in due course. If we require any additional information, you will be notified by email.

You can track your application's progress through our online portal which can be accessed by clicking the link below.

<https://maudsleycharity.smartsimpleuk.com>

Yours sincerely,

Maudsley Charity Grants Team

6. Track and revise an application

You can track your application through the grant administration process in SmartSimple via your Home portal. Under **applications**, you will see your application move through grant stages.

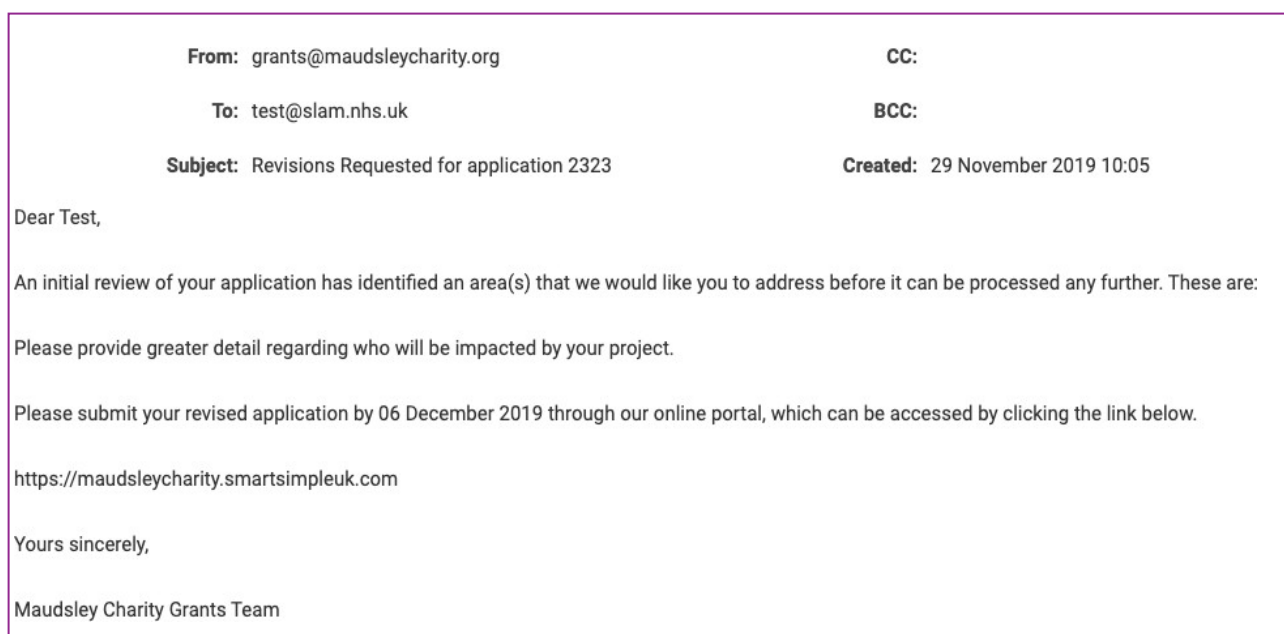
① See Appendix 2 of this document for a description of the application status tabs: Draft, Submitted, For Action, Under Review, Live Projects, Completed Projects and Not Awarded.

① Please check your email and your SmartSimple portal regularly and respond promptly to requests.

1. During the grant's administration process, the Charity may at any time request that your application be **revised**.



If this is necessary, we will make a note within your application and a notification will be sent to you for actioning.



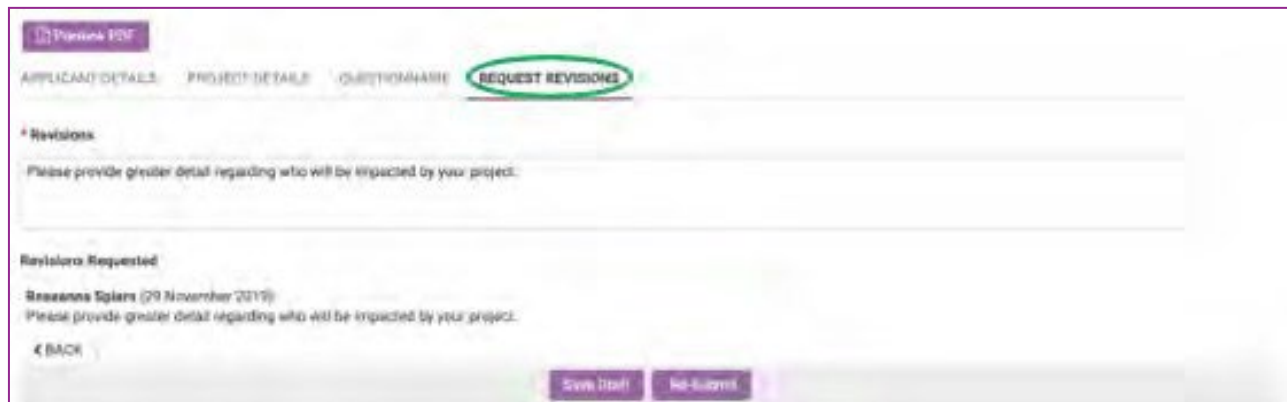
2. Log in to your SmartSimple account and navigate to the **Home** page.

① The status of your application will change to Revision Requested.

① In your Home portal, your application will appear under For Action.

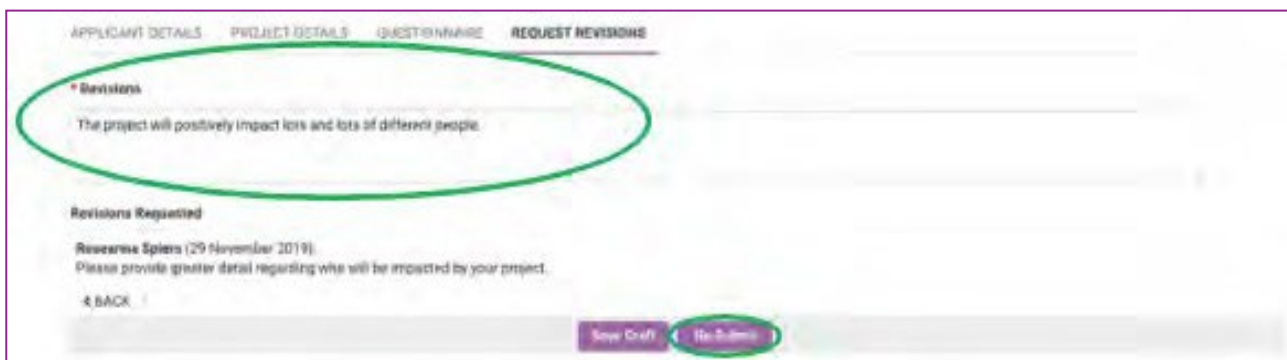


3. **Open** the relevant application.
4. Select **Request Revisions** tab. Read the requested revisions.
① Please contact the Charity at grants@maudsleycharity.org with any questions.



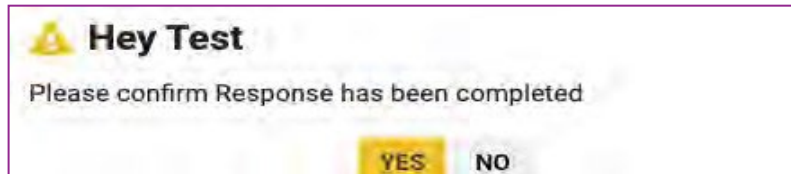
The screenshot shows the 'Request Revisions' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Revisions' with a red asterisk. The text below it says 'Please provide greater detail regarding who will be impacted by your project.' There is a text input field below this. Below the input field, there is a section titled 'Revisions Requested' with the text 'Revisions Spters (29 November 2019): Please provide greater detail regarding who will be impacted by your project.' At the bottom left, there is a 'BACK' button. At the bottom right, there are two buttons: 'Save Draft' and 'Re-Submit'.

5. Under **Revisions**, edit your application according to the revisions request.
6. **Save Draft**.
7. When you are satisfied with your response, **Re-Submit**.



The screenshot shows the 'Request Revisions' tab selected in the top navigation bar. The 'Revisions' section is highlighted with a green oval. The text below it says 'The project will positively impact lots and lots of different people.' Below this, there is a section titled 'Revisions Requested' with the text 'Revisions Spters (29 November 2019): Please provide greater detail regarding who will be impacted by your project.' At the bottom left, there is a 'BACK' button. At the bottom right, there are two buttons: 'Save Draft' and 'Re-Submit'.

8. A prompt message will appear asking you to confirm the Response has been completed. **Yes**.



The screenshot shows a confirmation prompt with a yellow warning icon and the text 'Hey Test'. Below it, the text says 'Please confirm Response has been completed'. At the bottom, there are two buttons: 'YES' and 'NO'.

9. Your application has been re-submitted.
① The status of your application is Resubmitted.
① In your Home portal, your application will appear under Submitted.

Applications

DRAFT (1)

SUBMITTED (1)

FOR ACTION (0)

UNDER REVIEW (3)

LIVE PROJECTS (0)

COMPLETED PROJECTS (0)

NOT AWARDED (7)

1-1 of 1

Application #	Lead Applicant	Project Name	Funding requested	Cell Name	Copy of Application	Submitted on	Status
1 2323	Test SLAM applicant	Test applicant	£200,000.00	UAT Training	Preview PDF	29/11/2019 09:47	Resubmitted Open

7. Panels and tracking an application

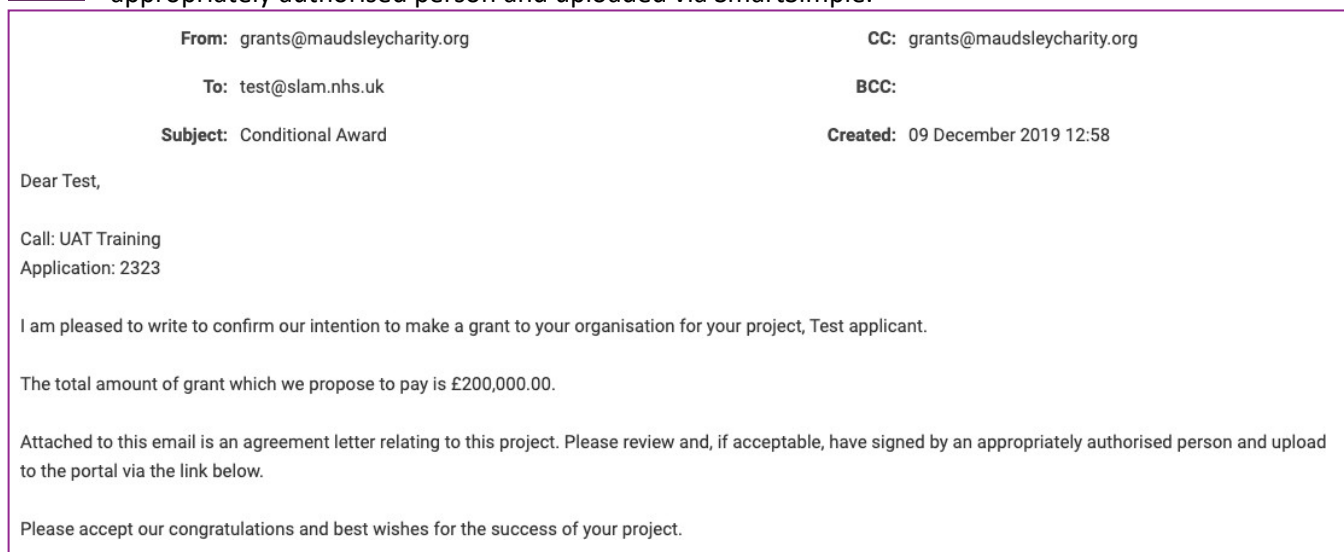
Depending on the Call your application is included in, the application may be considered by a Panel as part of the grant administration process.

 If so, you will be notified when the Panel is in progress by email. This email will include the date by which you may expect a decision on the outcome of your application.

From: grants@maudsleycharity.org	CC:
To: test@slam.nhs.uk	BCC:
Subject: Maudsley Charity - application under Grants Committee review	Created: 29 November 2019 11:15
Dear Test,	
Following our preliminary assessment, we advise that your application 2323 is now under review in preparation for submission to our Grants Assessment Panel. You will be notified of the outcome of your application by email on or shortly after 01 January 2020.	
https://maudsleycharity.smartsimpleuk.com	
Yours sincerely,	
Maudsley Charity Grants Team	

Being awarded or declined a grant

1. Applicants will be advised of the outcome of their application via email.
2. If the application has been declined, you will be advised of this and may receive feedback on your application in the email advising you of the outcome.
 - ① The status of your application is Declined.
 - ① In your Home portal, your application will appear under Not Awarded.
3. If the application has been successful, you will be advised of this and the amount awarded. The email will include the agreement letter or Award Document, which must be signed by an appropriately authorised person and uploaded via SmartSimple.



4. Navigate to your Home portal. **Open** the application.
 - ① The status of your application is Conditional Award Documents Requested.
 - ① In your Home portal, your application will appear under For Action.

Applications

DRAFT (1) SUBMITTED (0) **FOR ACTION (1)** UNDER REVIEW (1) LIVE PROJECTS (4) COMPLETED PROJECTS (0) NOT AWARDED (0)

1 of 1

Application #	Lead Applicant	Project Name	Funding requested	Award Value	Call Name	Copy of Application	Submitted	Status
1 2323	Test SLAM applicant	Test applicant	E200,000.00	E200,000.00	UAT Training	Preview PDF	29/11/2019 09:47	Conditional Award Documents Requested Open
			E200,000.00	E200,000.00				

5. **Upload** the completed agreement letter or Award Document, which must be signed by an appropriately authorised person.

2323

Application Type: Standard Process

Call Documentation: [UAT Test call documentation.docx](#)

☒ I have read and understand the instructions provided:

Application Reference: 2323

Status: Conditional Award Documents Requested

[Preview PDF](#)

Please upload all documents requested here

Upload Documents

[APPLICANT DETAILS](#) [PROJECT DETAILS](#) [QUESTIONNAIRE](#) [REQUEST REVIEW](#)

6. At the bottom of the page, **Submit Documents**.

Please upload all documents requested here

Upload Documents

[File Name](#)

File Name	Size	Date
Documents_contract_test.docx	11.6 KB	09/12/2019 15:08
Test.pdf	6.6 KB	09/12/2019 15:08

[APPLICANT DETAILS](#) [PROJECT DETAILS](#) [QUESTIONNAIRE](#) [REQUEST REVIEW](#)

First Name: Test

Surname: SLAM applicant

Job Title: Deputy director

Email: test@slam.sla.uk

[Save Draft](#) **[Submit Documents](#)** [NEXT >](#)

- 
- The screenshot shows the 'Thank you' page of the 'New York State e-Procurement System'. The page has a purple header bar with the system name and a 'Home' button circled in green. The main content area is white and contains the text 'Thank you' and 'You have uploaded documents'. There is a large grey rectangular area below the text, likely a placeholder for a document or image.

- | Applications | | | | | | | | | | |
|--|---------------------|--------------------------------|-------------|-----------------------------|---|------------------|-------------------|-------------------|---------------------------------------|------------------------|
| DRAFT (1) | | SUBMITTED (0) | | FOR ACTION (0) | | UNDER REVIEW (1) | | LIVE PROJECTS (5) | | COMPLETED PROJECTS (0) |
| | | | | | | | | | | NOT AWARDED (7) |
| <div> <div>+</div> <div>1-5 of 5</div> <div> <div>←</div> <div>→</div> </div> </div> | | | | | | | | | | |
| Application # | Lead Applicant | Project Name | Award Value | Copy of Application | Copy of Contract | Est. Start Date | Duration (months) | Proposed End Date | Status | |
| 2138 | Test SLAM applicant | UAT Test SLAM Directorate 5 | £30,000.00 | Preview PDF | Test_Slam_Directorate_5.pdf | 01/07/2019 | 13 | 01/08/2020 | In Progress | Open |
| 2086 | Test SLAM applicant | UAT Test SLAM Directorate 3 | £8,000.00 | Preview PDF | Test_Slam_Directorate_3.pdf | 08/07/2019 | 14 | 08/09/2020 | In Progress | Open |
| UAT TEST DC 180419-Open Grants-0536 | Test SLAM applicant | UAT Test SLAM Directorate 2 v1 | £20,000.00 | Preview PDF | Test_Slam_Directorate_2_v1.pdf | 01/06/2019 | 25 | 01/07/2021 | In Progress | Open |
| 2323 | Test SLAM applicant | Test applicant | £200,000.00 | Preview PDF | Grants_Contract_Testapplicant.pdf | 03/02/2020 | 18 | 03/08/2021 | Conditional Award Documents Submitted | Open |

- You will receive an email confirming receipt of your uploaded documents.

From: grants@maudsleycharity.org

CC:

To: test@slam.nhs.uk

BCC:

Subject: Grant Documents Submitted

Created: 09 December 2019 13:12

Dear Test

Thank you for uploading your signed agreement for grant 2323, Test applicant.

Provided that we are satisfied this has been completed correctly, we are happy for you to proceed with your project.

Based on the information supplied in your application, your project should run for 18 month(s). In accordance with this, we will now schedule payments to be made quarterly in arrears over the lifetime of the project unless we receive a specific request for a different pattern within 10 working days from today.

Please accept our congratulations and best wishes for the success of your project. You may contact us at any time for advice or support at grants@maudsleycharity.org.

<https://maudsleycharity.smartsimpleuk.com>

8. When the Charity accepts the submitted documents your project status will change.

① The status of your application is In Progress.

① In your Home portal, your application will appear under Live Projects.

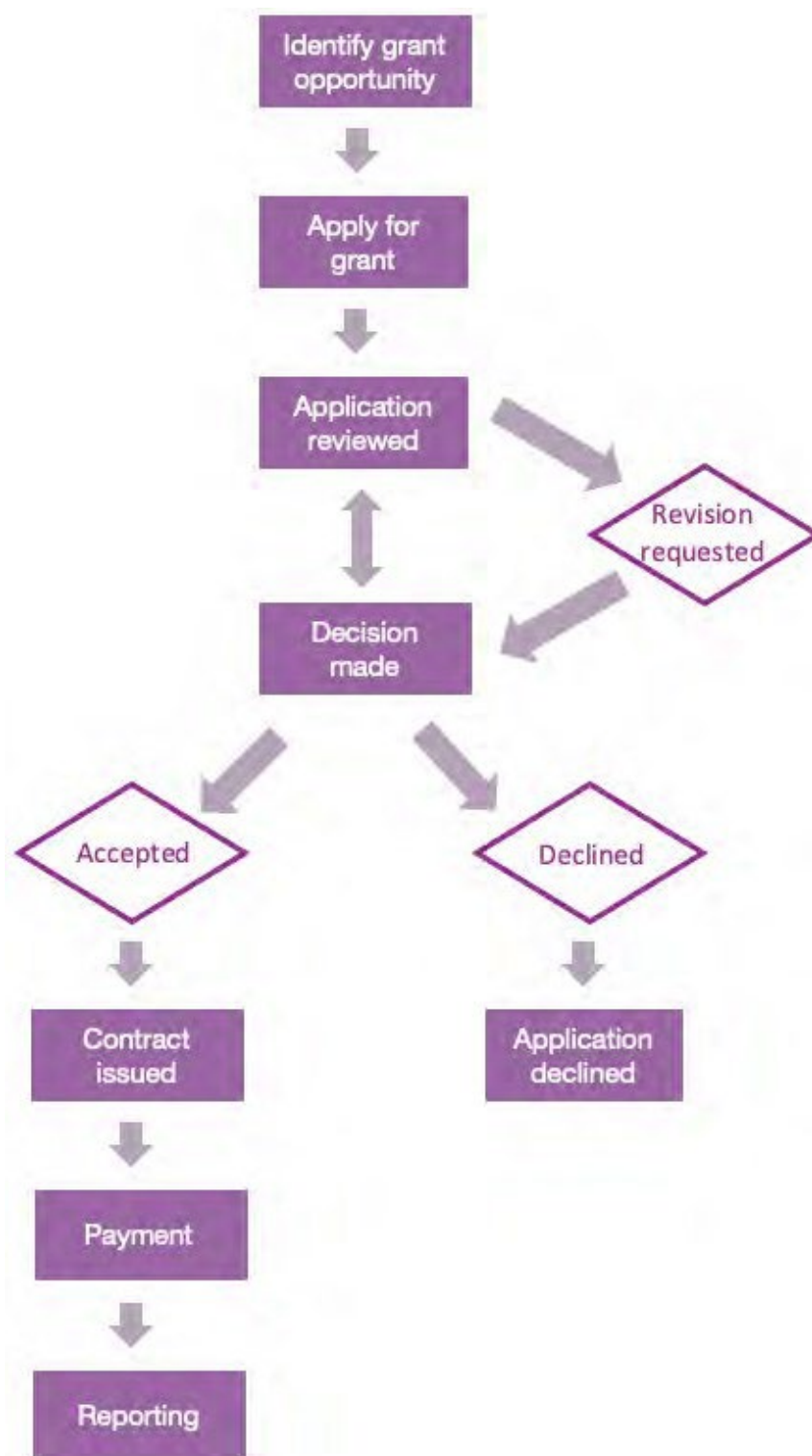
Applications										
DRAFT (1) SUBMITTED (0) FOR ACTION (0) UNDER REVIEW (1) LIVE PROJECTS (5) COMPLETED PROJECTS (0) NOT AWARDED (7)										
1-5 of 5										
Application #	Lead Applicant	Project Name	Award Value	Copy of Application	Copy of Contract	Est. Start Date	Duration (months)	Proposed End Date	Status	
2138	Test SLAM applicant	UAT Test SLAM Directorate 5	£30,000.00	Preview PDF	Test_Tracker_132.pdf	01/07/2019	13	01/08/2020	In Progress	Open
2086	Test SLAM applicant	UAT Test SLAM Directorate 3	£8,000.00	Preview PDF	Test_Call_Documentation.pdf	08/07/2019	14	08/09/2020	In Progress	Open
UAT TEST DC 180419-Open Grants-0536	Test SLAM applicant	UAT Test SLAM Directorate 2 v1	£20,000.00	Preview PDF	Test_Call_Documentation.pdf	01/06/2019	25	01/07/2021	In Progress	Open
2323	Test SLAM applicant	Test applicant	£200,000.00	Preview PDF	Grants_contract_test_slam_Test.pdf	03/02/2020	18	03/08/2021	In Progress	Open

9. Please continue to regularly check your Home portal and email for updates.
① Refer to the SmartSimple User Manual Applicant (Grant Awarded) for information on essential processes for the duration of your project.

Congratulations!
Best wishes for the success of your
project.

Appendix 1

The Grant application process



Appendix 2

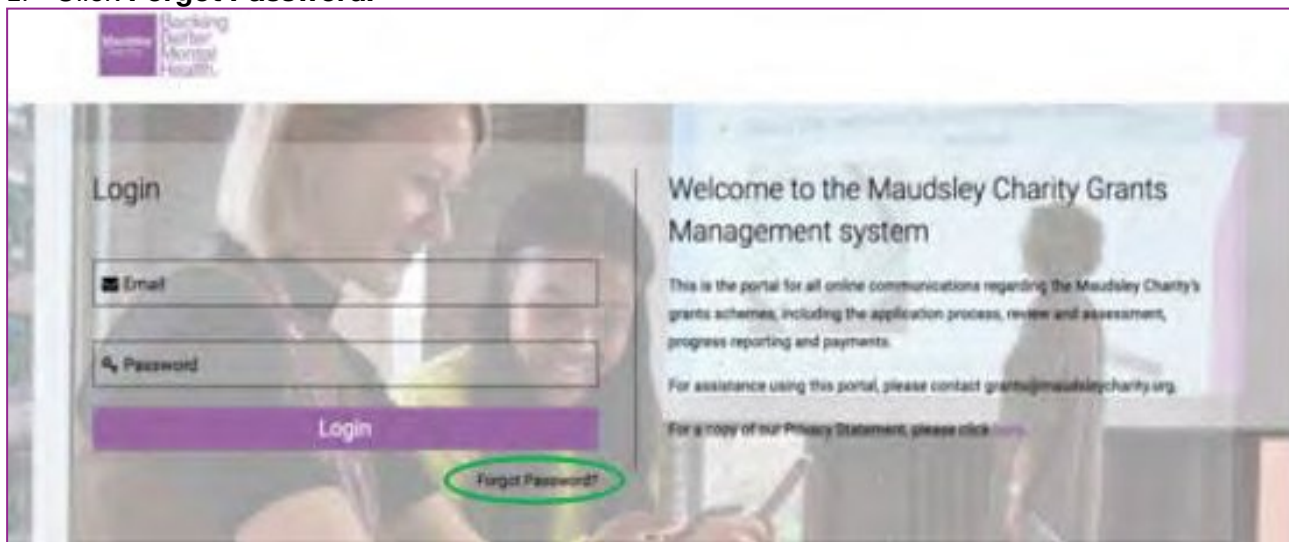
What each application Status means

Tab	Status	Description
Draft	Draft	Application is saved as a draft and not yet submitted.
Submitted	Submitted	Application has been completed by you and submitted to the Charity.
	Resubmitted	Application has been revised and resubmitted.
	Approved	Your application has been approved! You will receive an email notification to confirm the approval. Please sign and complete the attached contract.
For Action	Revision Requested	The Charity requested that your application be revised. A notification will be sent to you for actioning.
Under Review	Under Review	Application has been submitted and the Charity are reviewing it.
	Under Panel Review	Application under Panel Review.
	Pending Sign Off	Awaiting Director sign-off.
	Panel Completed	Panel has been closed.
Live Projects	In Progress	Project has been approved and is in progress.
	In Progress - Hold	Project was approved and in progress, but a hold has been placed (this may impact payments).
Completed Projects	Completed	Project has been completed and closed out.
Not Awarded	Declined	After being reviewed, the application has been declined.
	Discarded	The application has been discarded/deleted by you.

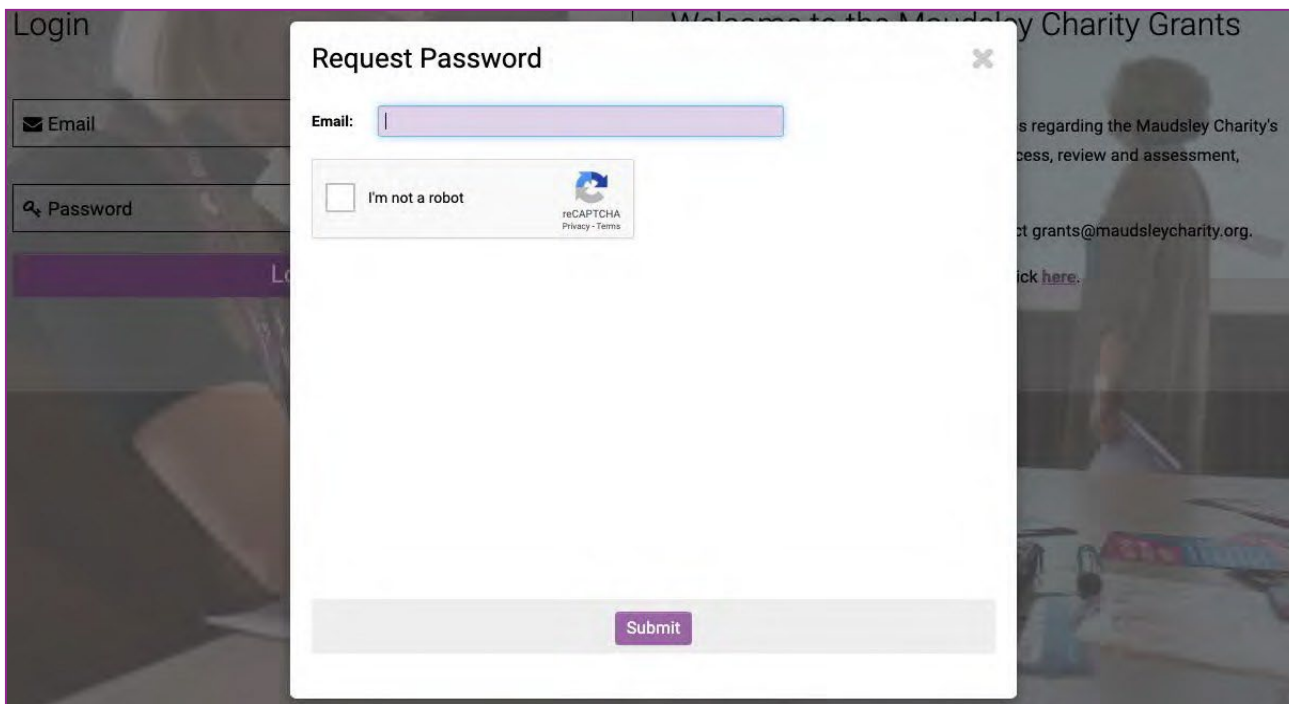
Appendix 3

What to do if you forget your SmartSimple password

1. Follow the link to SmartSimple <https://maudsleycharity.smartsimpleuk.com/>
2. Click **Forgot Password**.



3. Enter your email. Tick “I’m not a robot”. **Submit**.



4. You will receive a system email with a temporary password. **CHECK YOUR SPAM FOLDER!** Please use this to log on, before setting a new password.