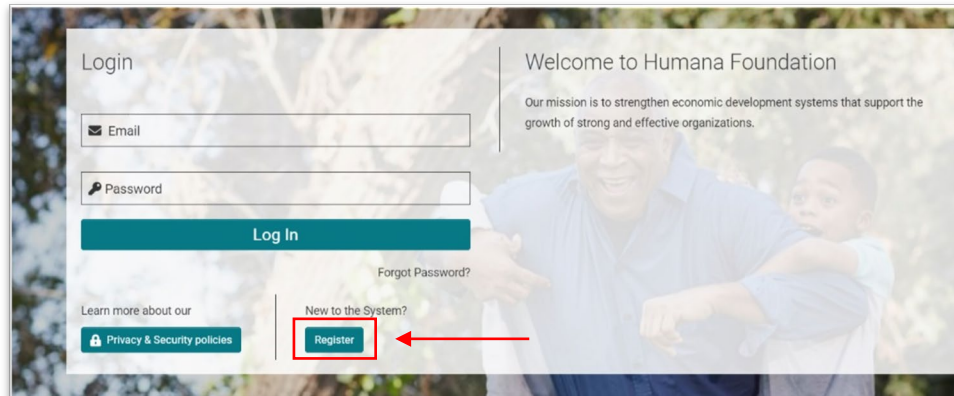


HUMANA FOUNDATION: SMARTSIMPLE [USER GUIDE]

Updated: 02/13/23

CREATING YOUR ACCOUNT



- Visit log-in page ([SmartSimple | Humana Foundation](#)) and click “Register” at bottom of screen.
- On next page, select “US Registered Non-profit” or “Fiscally Sponsored Organization” for your organization. Users selecting US Registered Non-profits can type their organization name in the appropriate search bar on the next screen and press “enter” to see available results.

- Fill out corresponding fields on the page with contact information for your organization. If you are registering as a Fiscally Sponsored Organization and your organization name does not auto-populate in the “Organization name” field on the landing page, you can add your organization to SmartSimple by selecting “click here to add it.” (see screenshot above)

NOTE: The contact information you provide on the registration page will serve as the primary email and phone number for your account within SmartSimple. All communication from the SmartSimple system and Humana Foundation staff will be sent to this address or phone.

- When you have completed the required fields for registration, click “submit” at the bottom of the page. Your registration is now complete

ACTIVATING YOUR ACCOUNT & LOGGING INTO SYSTEM

- Upon completing registration, an activation link will automatically be sent to the email address listed on your organization’s profile. Follow the link in the email to set up an account password.
- Set a password that meets the system requirements, complete the CAPTCHA at the bottom of the page and click “submit.”
- You will be redirected to your homepage in SmartSimple:

The dashboard is divided into three main sections:

- APPLICANT ITEMS:** Contains three cards: 'Funding Opportunities' with a count of 2, 'Your Drafts/Needs Revisions' with a count of 1, and 'Your Applications' with a count of 1. A green arrow points to this section with the text: 'Begin applications | Make edits if needed | Final submissions'.
- REPORTS AND AGREEMENTS:** Contains three cards: 'Reports Requested' with a count of 0, 'Your Reports (Drafts)' with a count of 0, and 'Your Reports (Completed)' with a count of 0. A green arrow points to this section with the text: 'Upload and complete any requested progress or final reports'.
- AGREEMENTS:** Contains two cards: 'Unsigned Grant Agreement' with a count of 0 and 'Completed Grant Agreement' with a count of 0. A green arrow points to this section with the text: 'Completed agreements requiring your signature will be uploaded here'.

- Click just below the top header bar on the link for “profile.”
- Scroll down to view all required options on profile. Complete the required fields and click “save draft” along bottom bar of screen:

The form contains several required fields marked with an asterisk:

- * Are there any Humana Associates who are on your board? Please provide their names or type NA if not applicable.
- * Current Year Operating Budget (\$)
- * Previous Year Operating Budget (\$)
- * Please provide your largest grants from the last 3 years (up to five) including funder names, grant amounts, and awarded years - type NA if not applicable.
- Are there any confirmed funds that you are expecting in the next three months? Please provide the funder names and the amounts.

At the bottom of the form, there are two buttons: 'Save Draft' (highlighted with a red box and a red arrow) and 'Submit Documentation'.

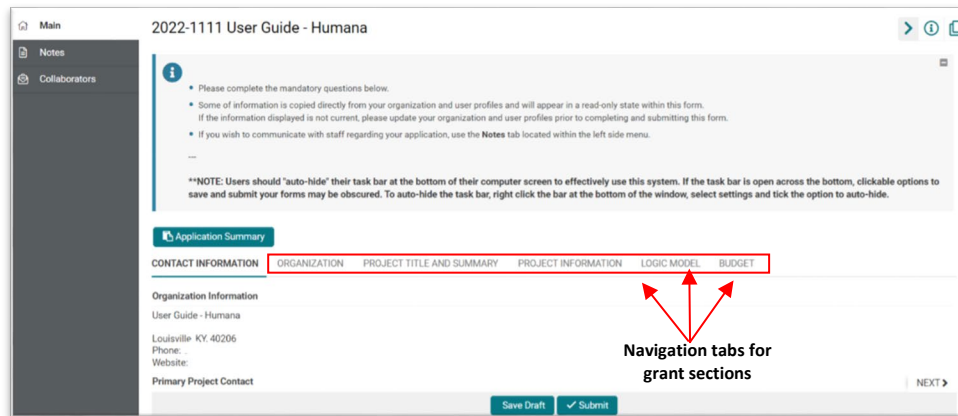
- After saving draft, click “submit documentation” to complete registration for your organization.

COMPLETING A GRANT APPLICATION

- Your homepage in SmartSimple will show current available funding opportunities for your organization. Click the “Funding Opportunities” box to view a complete list of open grants.
- From list of available grants, navigate to the appropriate application (applicants seeking up to \$250,000 in funding should select “Small Grants” and those seeking more than \$250,000 in funding should select “Large Grants”) and click the “Apply Now” box.

NOTE: Each grant requires completion of a prescreen check that verifies appropriate qualifications for funding. Users are unable to begin a grant application until successful completion of the screen.

- Fill out the brief prescreen questionnaire on the next screen and click “check eligibility” in the bottom bar of the page.
- Upon successful completion, SmartSimple will load into the application page for the selected grant. Users should see a screen similar to the following image:



- Fill out the requested information on the current screen of the grant application and click “save draft” in the bottom bar of the window.
- Complete the full grant application by navigating through each tab (highlighted in red in the above picture) and providing the required information. **USERS SHOULD CLICK “SAVE DRAFT”** in the bottom bar of the window each time they complete a new tab in the grant application.
- Please note, In the “**budget**” tab, you must click “**open budget form**” at the bottom of the screen to load into SmartSimple’s built-in budgeting tool. All budgets must be submitted through SmartSimple’s budget tool to properly log data for future progress reports.

TIP: If your application includes **a multi-year budget**, once you open the budget tool, you will fill out separate tables for each year of your proposed budget (see image on following page). Begin your budget with your current calendar year in the table labeled “Itemized Budget Year.” Applicants then have the option of submitting up to a five-year budget in SmartSimple

See next page for budget example

COMPLETING A GRANT APPLICATION (cont.)

Multi-Year Budgets: Upload budget for current year in “Year 1” table

Itemized Budget Year 1

Instructions

- The total costs of Humana Foundation investment should be equal to “Total Amount of Funding Requested (\$)” in the Organization tab.
- Please use Other table to add items that are not available in the Program Expenses table.
- Year 1 will be current year (continue with additional tables if budget is multiple years).

Admin/Salary/General Operating Expenses (overhead costs) Year 1

	Humana Foundation Investment	In Kind Donations (optional)	Other Investors (optional)	Total Project Budget
Combined Salaries	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Combined Fringe (XX percent of total salaries - optional)	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Program Expenses (where applicable) Year 1

Type	Humana Foundation Investment	In Kind Donations (optional)	Other Investors (optional)	Total Project Budget
	0	0	0	0

Multi-Year Budgets: Use new table (Year 2, etc.) for next year(s) of budget

Itemized Budget Year 2

Admin/Salary/General Operating Expenses (overhead costs) Year 2

	Humana Foundation Investment	In Kind Donations (optional)	Other Investors (optional)	Total Project Budget
Combined Salaries	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Combined Fringe (XX percent of total salaries - optional)	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Program Expenses (where applicable) Year 2

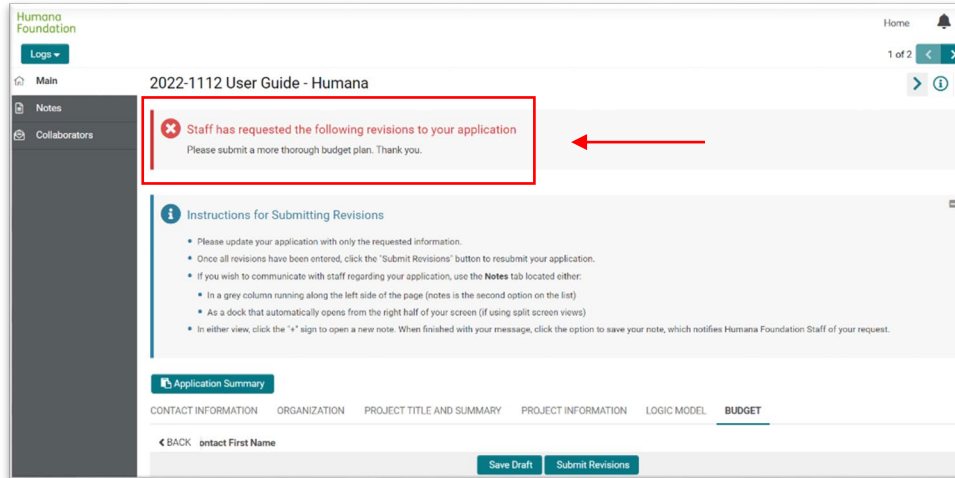
Type	Humana Foundation Investment	In Kind Donations (optional)	Other Investors (optional)	Total Project Budget
	0	0	0	0

- After completing your budget, click “save” in the pop-up window once you have completed your budget and “close” to exit the tool -- Your application should now include an itemized table of your budget.
- Click “submit” to complete your application submission. You will receive a notification that the application was submitted successfully.

NOTE: To verify your application is pending in SmartSimple’s system, navigate to the home page and check there is a “1” (or an increase from the previous number, if multiple applications pending) listed in the “Under Review” category in the top section.

GRANT APPLICATION REVISIONS

- In certain circumstances, Humana Foundation staff may require additional information or revisions on your grant application. You will receive an email notifying you of requested updates to your application. Log in to SmartSimple via the [home page](#) and click the “your drafts/needs revisions” section on your home page.



- Requested revisions will be displayed in a grey box at the top of the screen on the landing page of your grant application. Update your application with the requested information and click “save draft” in the bottom bar on the screen.
- Finalize your revisions by clicking “submit revisions,” located next to the save draft button.

DUE DILIGENCE PROCESS

- If Humana Foundation staff reviews your application and is interested in further pursuing your grant proposal, you will receive an email notification requesting due diligence documents.

NOTE: Not all applications will reach this stage of the granting process. If selected, you will be notified by email with instructions on completing the due diligence process.

- Log in to your account, click your application located under the “Your Applications” box. Select “open” on the left side of your screen next to the appropriate application. Select the “organization” tab across the top of your application.
- Scroll to the bottom of your screen and click the green button (the button has an arrow pointing up, see below image) below the “Due Diligence Documents” option. Upload the appropriate document(s) – suggested documents are most recent audit OR Form 990 – and close the popup window. Click “Submit Due Diligence” to complete your upload:

The screenshot shows a web application interface with a navigation bar at the top containing tabs: CONTACT INFORMATION, ORGANIZATION (highlighted with a red box), PROJECT TITLE AND SUMMARY, PROJECT INFORMATION, LOGIC MODEL, BUDGET, and ELIGIBIL >. Below the navigation bar, there are three sections of questions, each with a dropdown menu set to 'No':

- * Are you using a fiscal sponsor for this project? (A red arrow points to this question)
- * Did an external grant writer help complete this application?
- * Due Diligence Documents

The 'Due Diligence Documents' section contains the text: 'Upload 1 of the following items: 1. Most recent audit (PDF) OR 2. Most recent Form 990 (PDF)'. Below this text is a red box containing an upload icon and the text 'Upload Due Diligence'. A red arrow points to this box.

At the bottom of the form, there are three buttons: 'Save Draft', 'Submit Due Diligence' (highlighted with a red box), and 'Delete'. A red arrow points to the 'Submit Due Diligence' button. Navigation arrows for 'BACK' and 'NEXT >' are also visible.

- You will receive an email **AFTER Humana Foundation staff has reviewed** and approved your Due Diligence file submission.

You have now completed your application process in the SmartSimple system. Your application will be found under the “Your Applications” section in the top table of your home page. Humana Foundation staff will contact you with any next steps.