

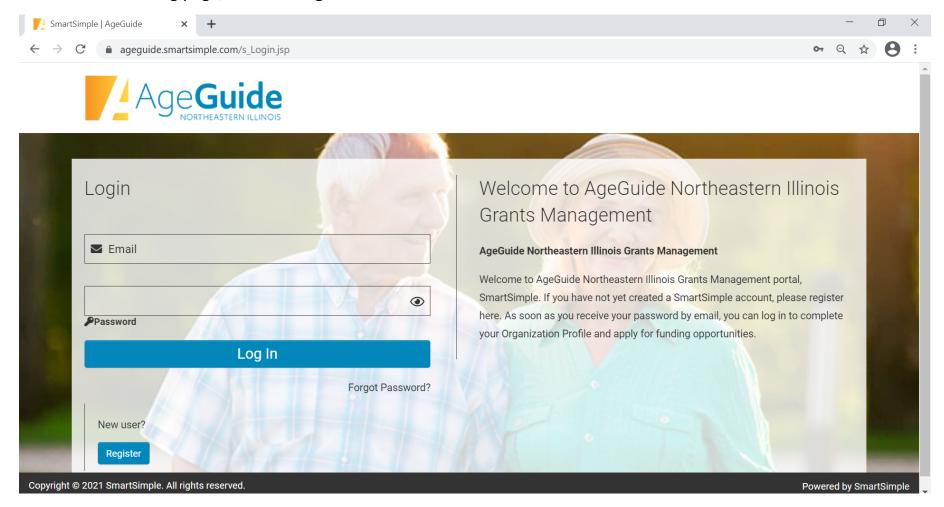
FY2022 Request for Proposals SmartSimple Online Management Platform Application Instructions

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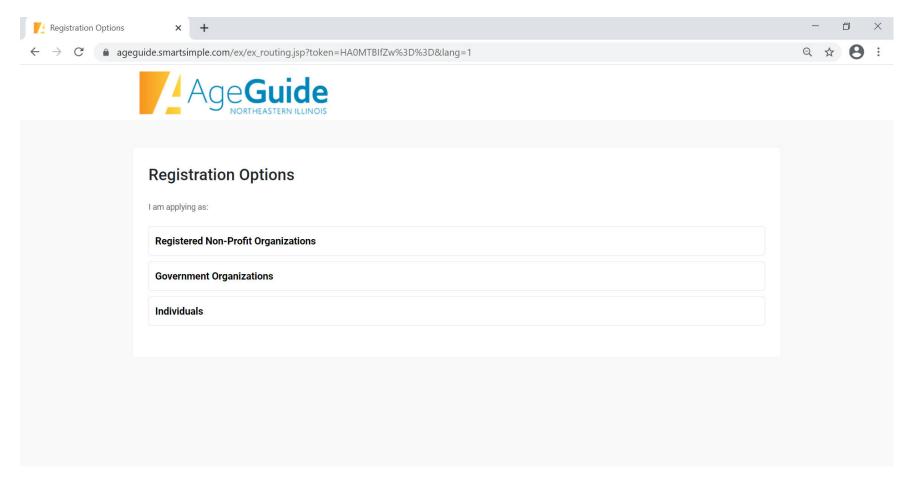
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Registration

- 1. To start the registration process, navigate to www.ageguide.smartsimple.com
- 2. On the landing page, click the **Register** button underneath "New User?"



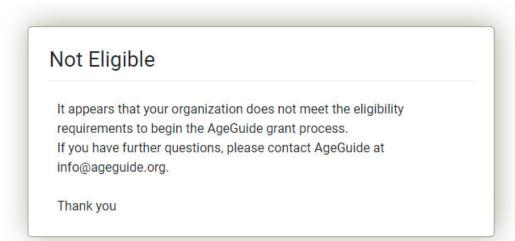
3. The next page requires the user to select an organization type. Applicants should select "Registered Non-Profit Organization" or "Government Organization"



4. An Eligibility Quiz will appear. All applicants must complete this eligibility quiz to proceed to registration. Once you have made your selections, click "Submit". If you selected "Government Organizations" skip to step 7.

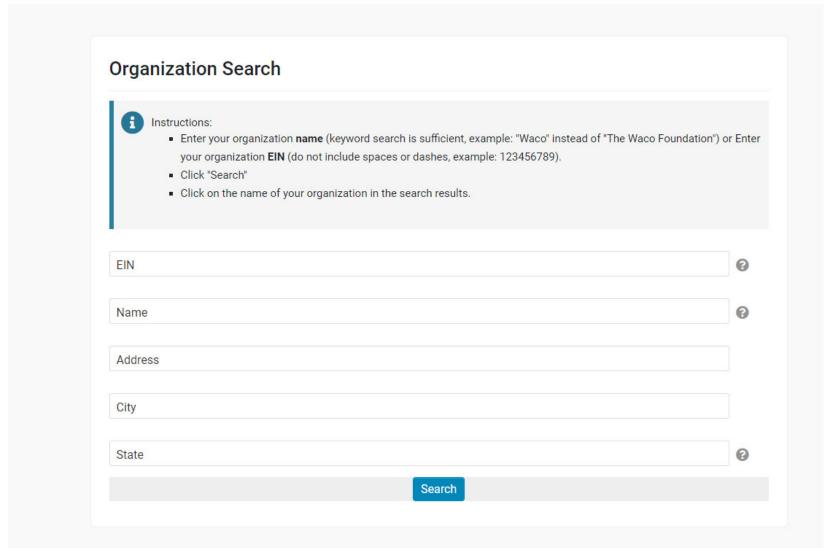


Eligibility Information i Pre-Registration Eligibility Quiz Welcome to AgeGuide Northeastern Illinois Grants Management system. Before registering an account we would like to ask you a few questions to check whether you are eligible to receive support from us. * AgeGuide grants are for county-wide services. Can your agency provide the service throughout the county applied for? Select One * AgeGuide grant recipients must place special emphasis on providing services to under-served populations, racial and cultural minorities, and lowincome, limited-English-speaking, and LGBTQ older adults. Can your agency serve underserved populations at least in proportion to their representation in the county? Select One V * All Title III grants, except for III-D, require a recipient match which may include both local cash and in-kind contributions. Can your agency provide adequate match throughout the grant award period? If your organization is not applying for Title III funding, or is applying only for Title III-D funding, select "Not Applicable". Select One V * AgeGuide grant recipients must offer participants the opportunity to contribute to the cost of service, and must be able to track this program income adequately. Can your agency track and manage program income throughout the grant award period? Select One Save Submit



5. If you selected "Non Profit," the next screen will be the Organization Search. SmartSimple maintains a database of nonprofit organizations, and can pull some data automatically into your organizational profile. Read the instructions on the page, complete the required fields, and click "Search." Do not include spaces when entering the EIN





- 6. A list of matching organizations will appear. Click the name of your organization from the list.
- 7. The "Organization Information" page will appear. Complete all required fields and click "Submit."
- 8. You will receive an email address with a link to create a password and login. Once you have created your account, login with your new credentials.

Registration

Registration Complete

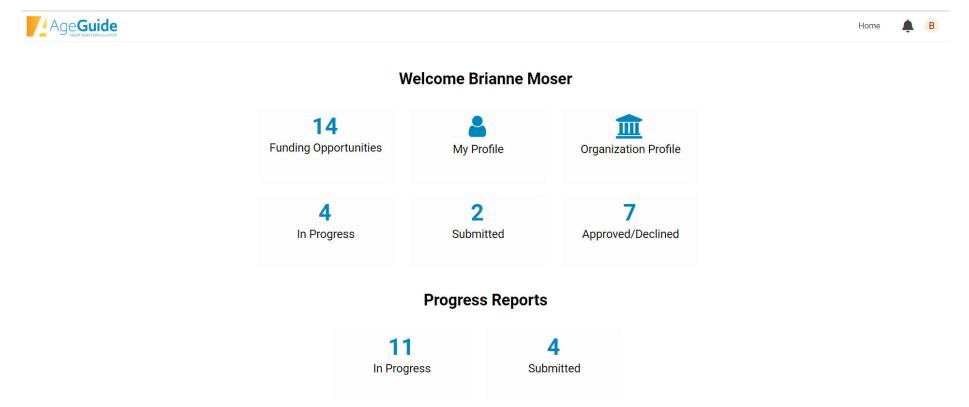
Your registration has been completed. You will receive an email with a link to create a password and login in the next 5 minutes. If you do not receive this email, please check your spam folder.

Login here

9. You may want to add multiple individuals to the same organization. The second employee will need to register and create a new profile using the same organization name. These individuals will then be able to contribute to the same applications in-progress.

Home Screen

When you log into your account, you will be taken to your "Home Screen."



Funding Opportunities: All of the available funding opportunities are show here. See below for detailed instructions for funding opportunities.

My Profile: Your profile as an individual user

Organization Profile: Your organization's profile. See below for detailed instructions about creating and maintaining your organization's profile.

In Progress: Applications that are in-progress are displayed in this section. Applications for funding do not need to be completed all at once. You can save and return to your applications at a later time.

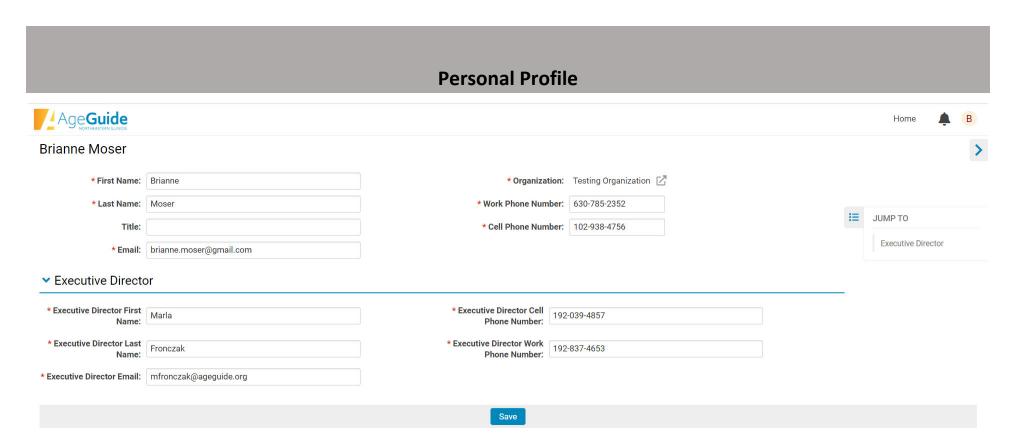
Submitted: Applications submitted by your organization will show in this section. Once an application is submitted, it cannot be edited.

Approved/Declined: The status of each application will show in this section.

Progress Reports: This section will be used only if your organization is approved for grant funding. Here is where you will find any reports that are due from your organization throughout the year, such as the Grantee Monthly Expense Report, and the Quarterly Program Performance Report.

In Progress: Any reports due will show in this section. You will be able to save reports to work on at a later time.

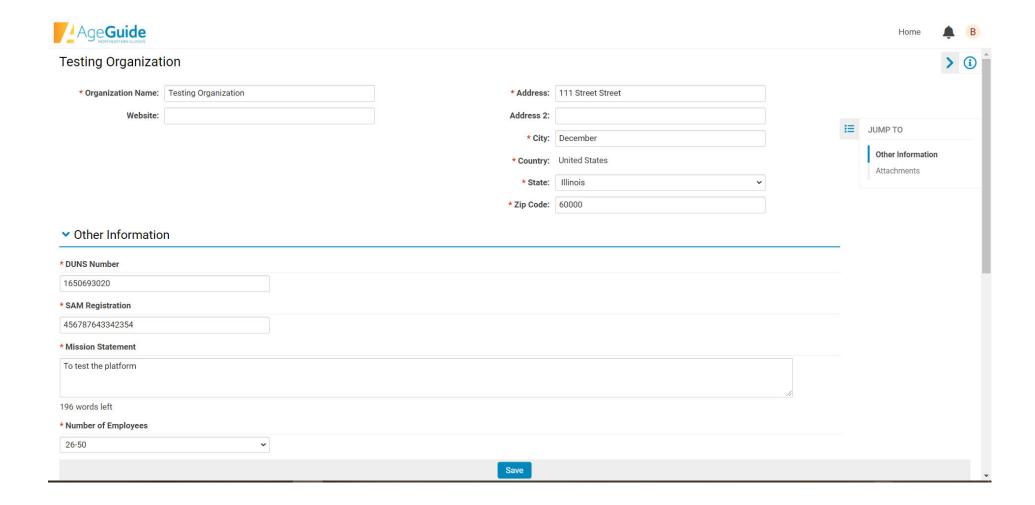
Submitted: Completed reports will be found in this section.



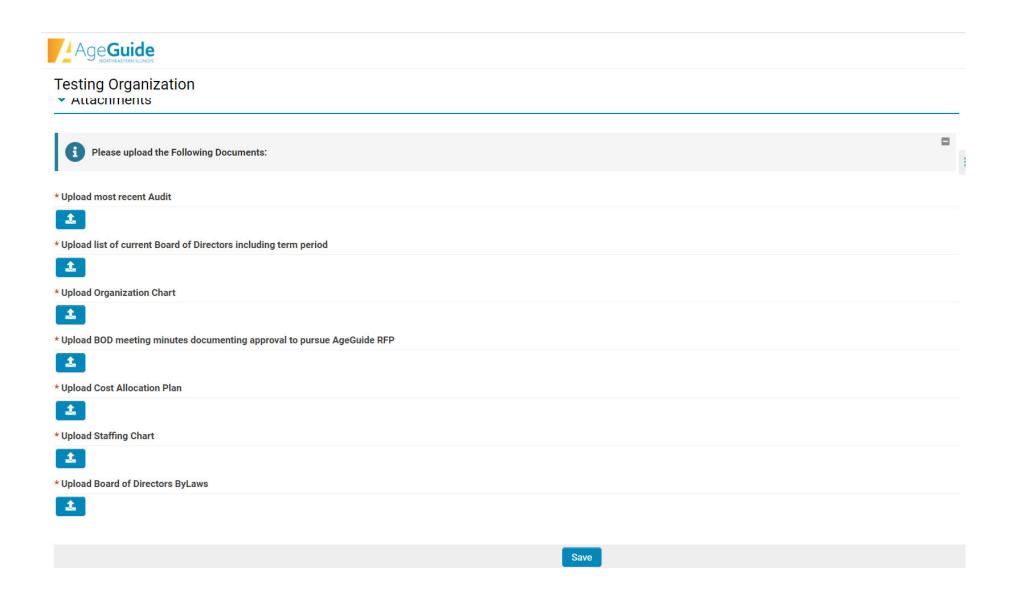
Your personal profile shows information for each individual user. Please ensure that your Personal Profile is up-to-date. This includes your name, email, phone numbers, and the contact information for the Executive Director at your organization.

Organizational Profile

An organizational profile must be created and maintained for all organizations. Multiple employees may be registered to the same organizational profile. Any profile associated with your organization may update the organizational profile. This information can be updated at any time. Please ensure this information was entered accurately for your organization.



The first part of the Organizational Profile will be created by the first user who generates an account for your organization. It contains your organization's address, website, DUNs number, SAM registration, Mission Statement, and Number of Employees.

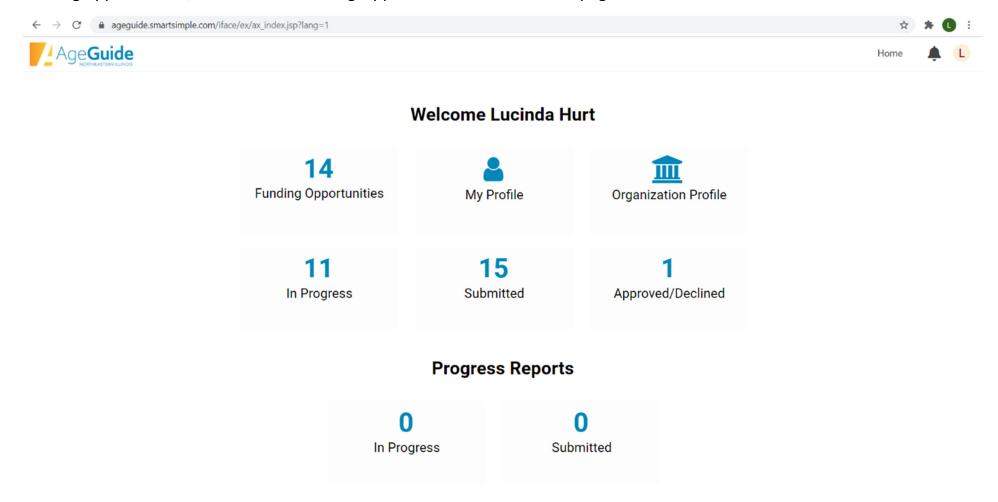


The second part of the Organization Profile must be completed by uploading documents into the system. Your organization must upload:

- 1. Most recent audit
- 2. List of current Board of Directors including term period
- 3. Organizational Chart
- 4. BOD meeting minutes documenting approval to pursue AgeGuide RFP
- 5. Cost Allocation Plan
- 6. Staffing Chart
- 7. Board of Directors ByLaws
- 8. Risk Review

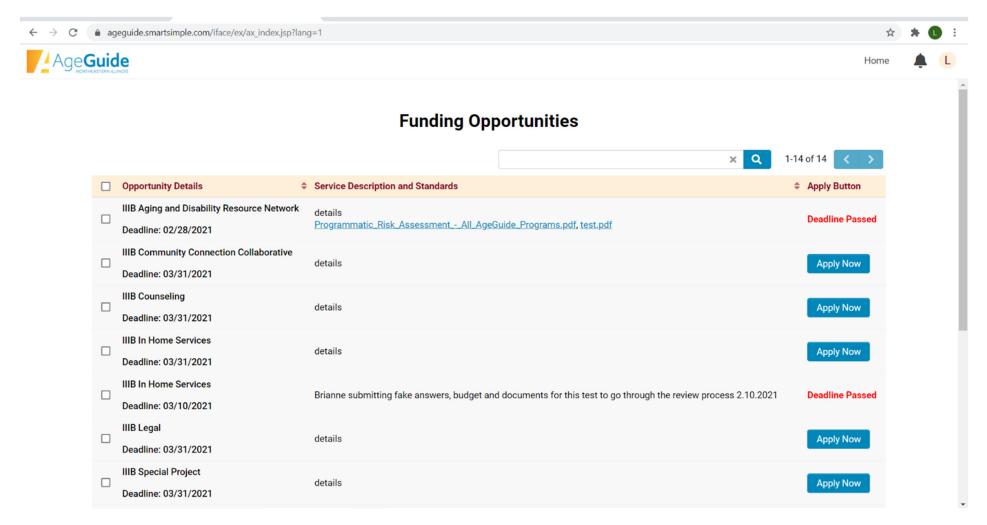
Applying for Funding Opportunities

Once you complete eligibility and set up your organizational profile, you will log in and find this home screen. To access the funding opportunities, click on the "Funding Opportunities" on the home page.



After clicking on the Funding Opportunities, you will see the screen below. Open funding opportunities will have the "Apply Now" button and closed opportunities will show "Deadline Passed." Click "Apply Now" on the opportunity you wish to apply for. Be sure to click on any documents associated with the application you are completing. Project Descriptions you will need

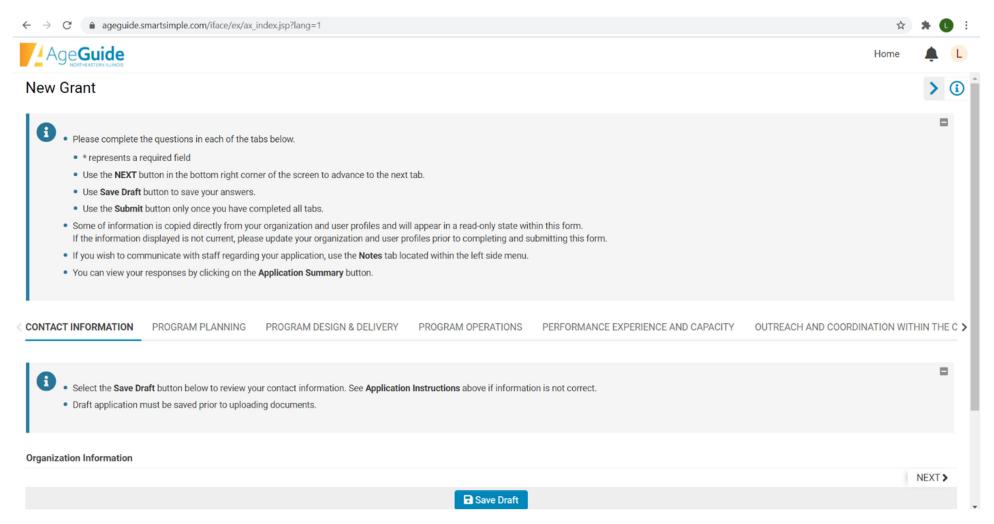
to inform your application can be found as links, like the link in the IIIB Aging and Disability Resource Network application in the screen shot below.



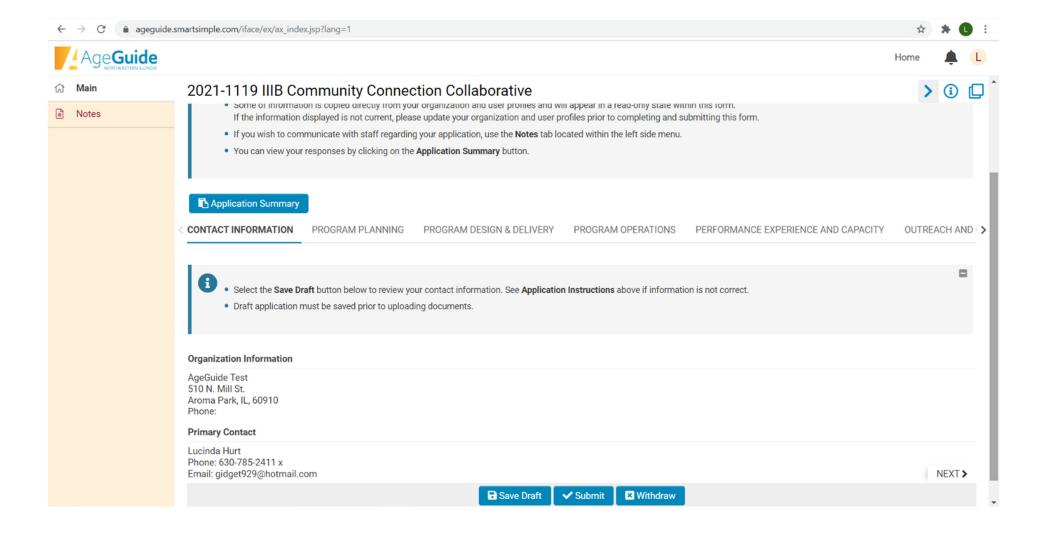
For the purposes of this user guide, we will use the IIIB Community Connection Collaborative as an example application.

After clicking "Apply Now," the application will open. Review the instructions at the top of the page prior to starting your application. When you hit "Save Draft" your Organizational Information will prepopulate from your Organizational Profile. If this information is incorrect, make sure to go back to your home screen to update your Organizational Profile information.

Before clicking "Save Draft"



After clicking "Save Draft"-Notice that the Organizational Information is completed based off the information in the organizational profile.



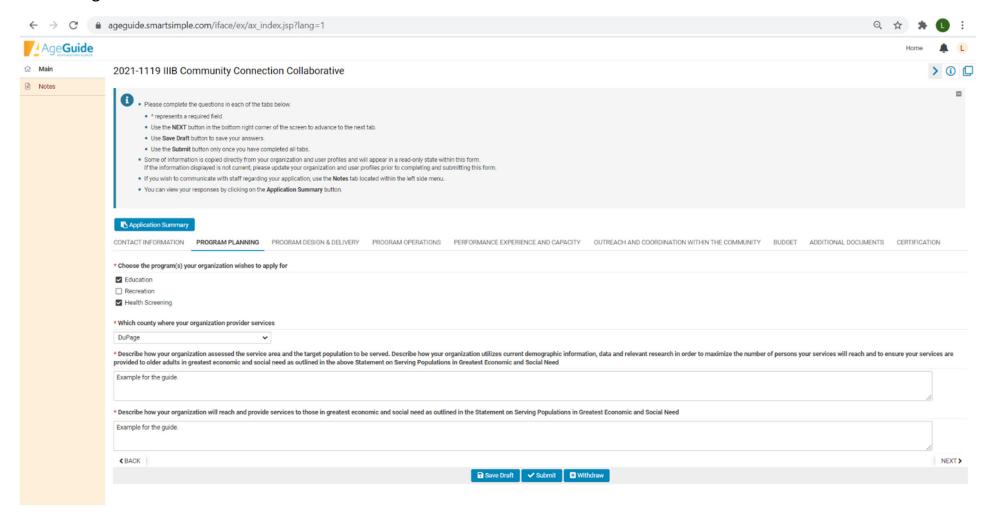
You can now proceed to completing the application. Next to the "Contact Information" are the following Tabs:

- 1. Program Planning
- 2. Program Design and Delivery
- Program Operations
- 4. Performance Experience and Capacity
- 5. Outreach and Coordination within the Community
- 6. Budget

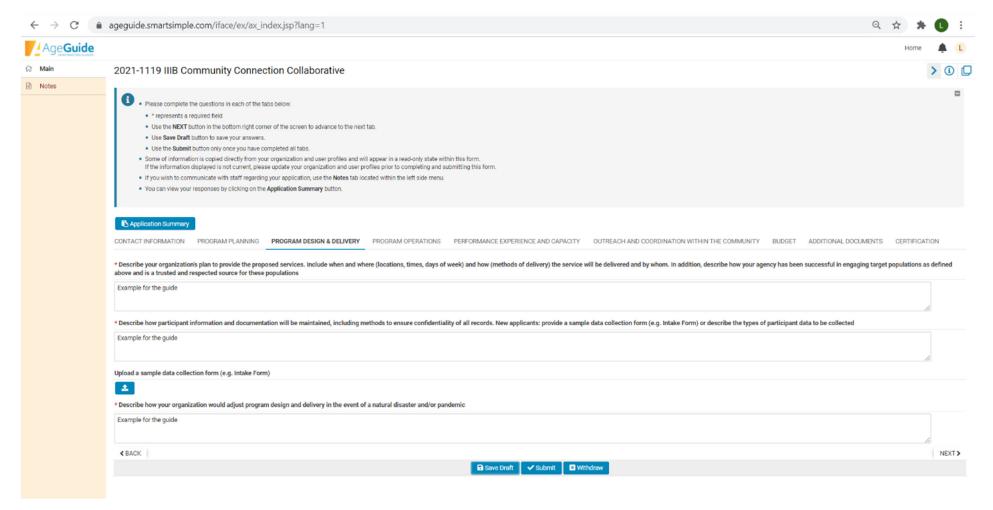
- 7. Additional Documents
- 8. Certification

To Navigate to the next tab, you can click on the tab header or click "Next" in the bottom right corner of the page.

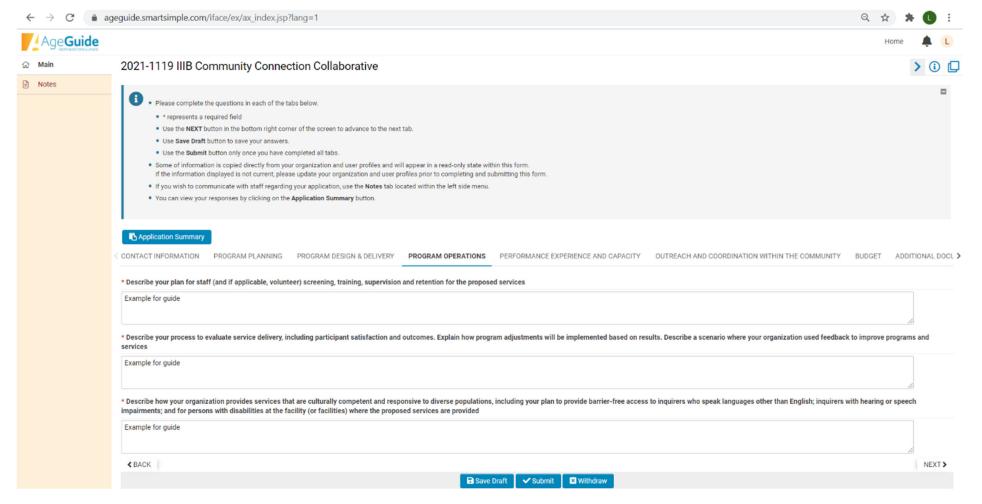
Program Planning: For packages, where there are optional services, chose the service(s) you wish to apply for in that package. Answer the questions on the page, click "Save Draft" and then proceed to the next tab by clicking on the tab or "Next" in the bottom right corner.



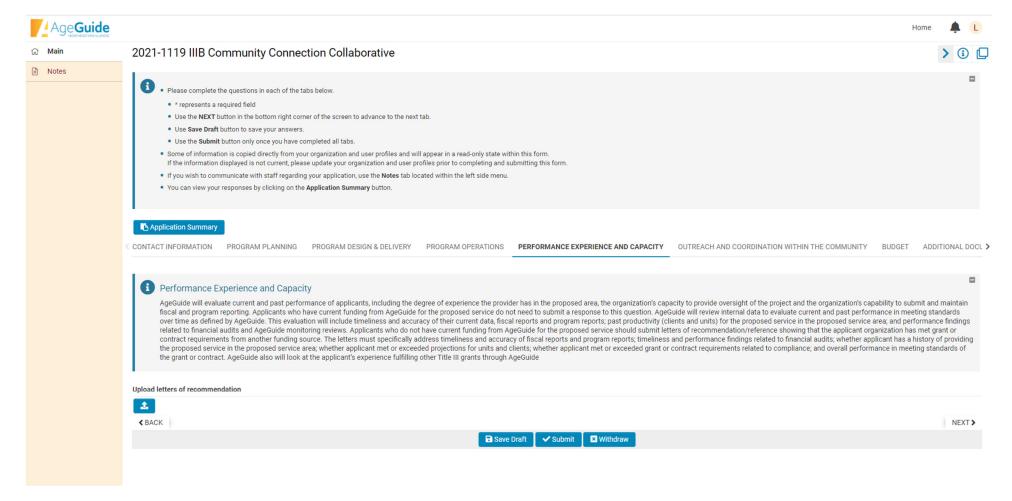
Program Design and Delivery: Answer the questions on the page, click "Save Draft" and then proceed to the next tab by clicking on the tab or "Next" in the bottom right corner.



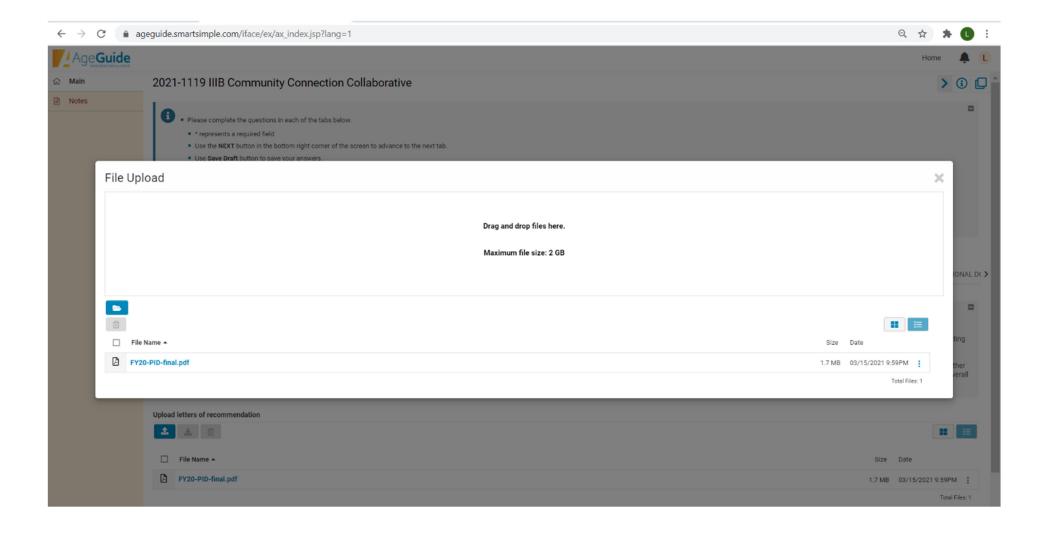
Program Operations: Answer the questions on the page, click "Save Draft" and then proceed to the next tab by clicking on the tab or "Next" in the bottom right corner.



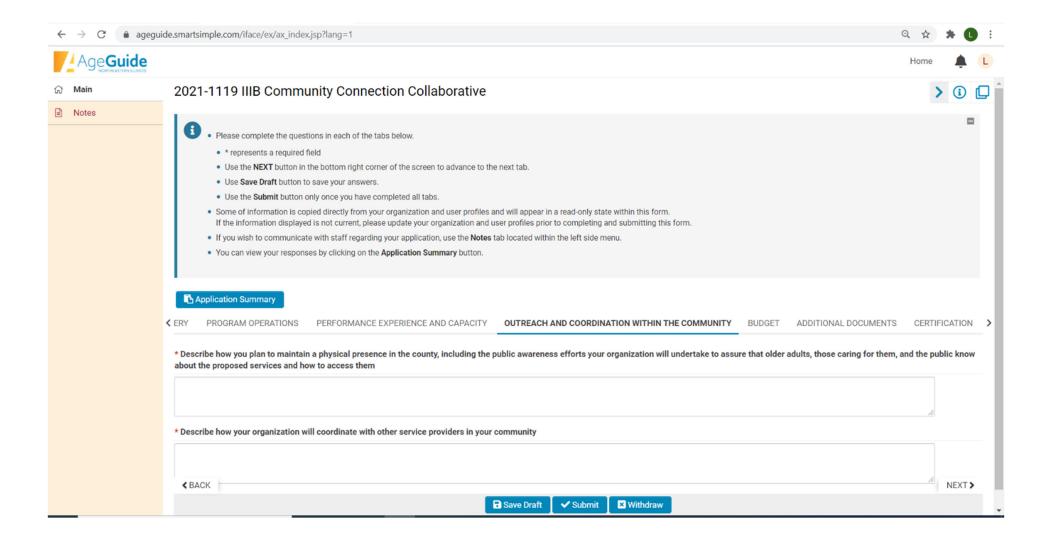
Performance Capacity and Experience: Review this question, specific to current and new grantees. There are no questions for this tab. New grantees applying for this service will need to upload letters of recommendations. To upload letters, click on the upload button in the bottom left corner under "Upload Letters of Recommendation."



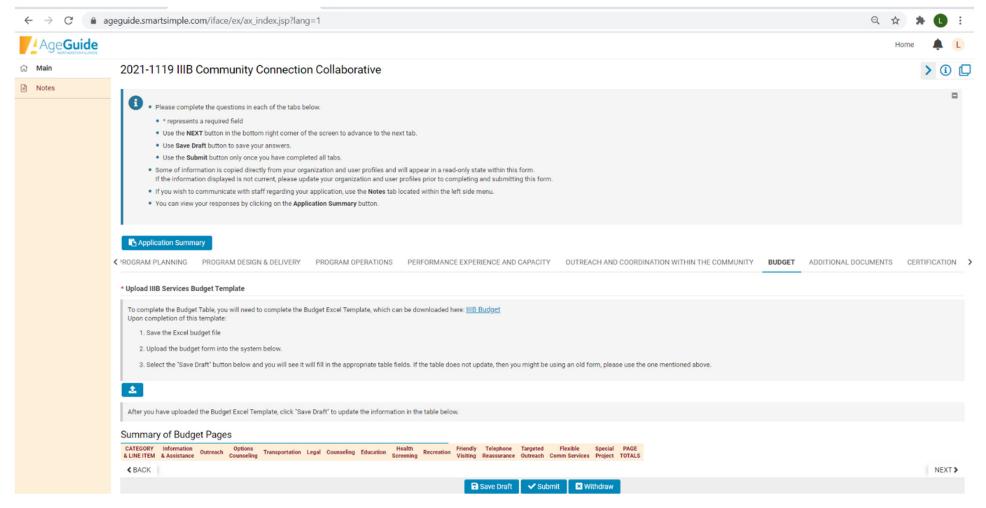
Chose a document from your computer to upload via the browse folder in the pop up window or drag and drop the file. Once the file is uploaded, you will see the screen below. Follow the same steps to upload multiple documents. When finished, click the "x" at the top right hand corner. Click "Save Draft" and proceed to the next tab by clicking on the next tab or clicking "Next" in the bottom right hand corner.



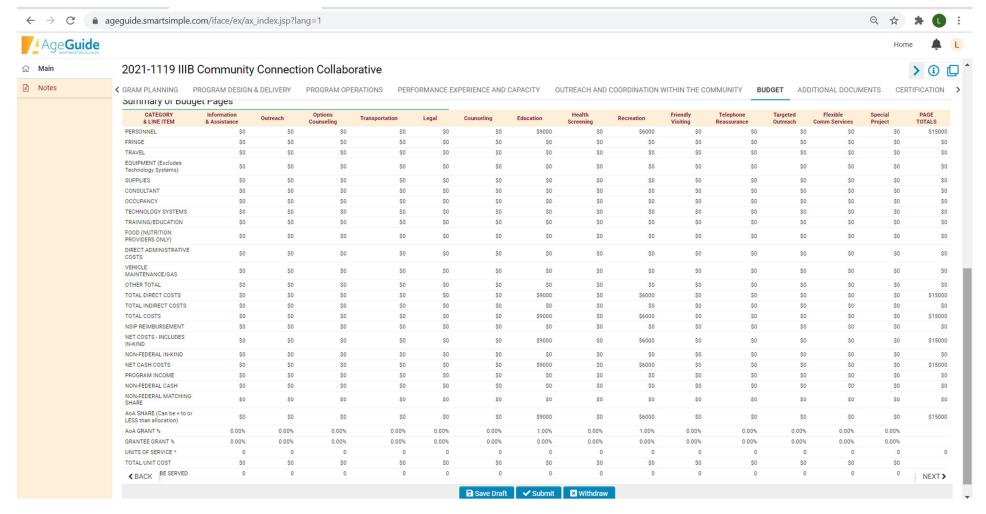
Outreach and Coordination within the Community: Answer the questions on the page, click "Save Draft" and then proceed to the next tab by clicking on the tab or "Next" in the bottom right corner.



Budget: Click in the middle of the screen on the link to the budget. In this application it says IIIB Budget. The budget template will download to Excel. Once completed, click on the upload button and upload the complete budget back to SmartSimple.



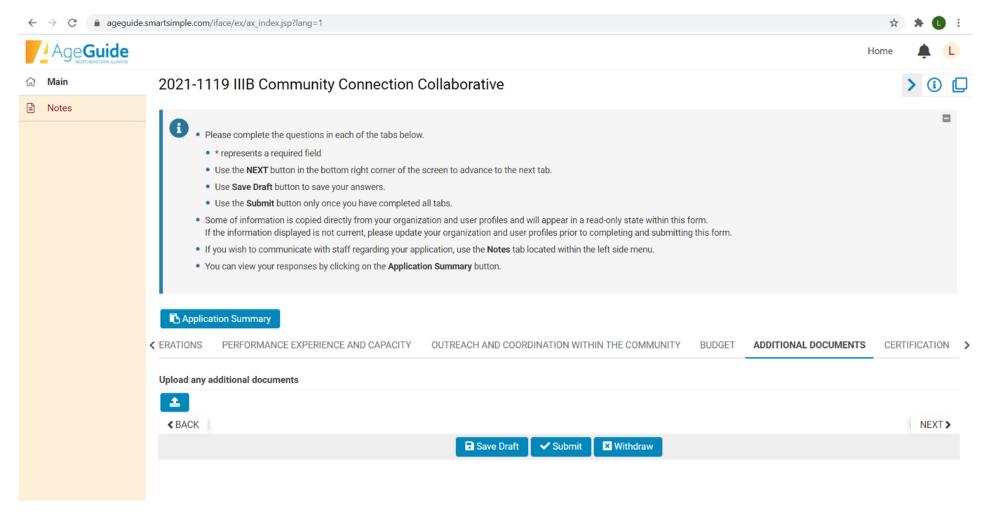
Once the budget is uploaded, click "Save Draft" and you will see the budget populate on the page. You must do this before submitting the application.



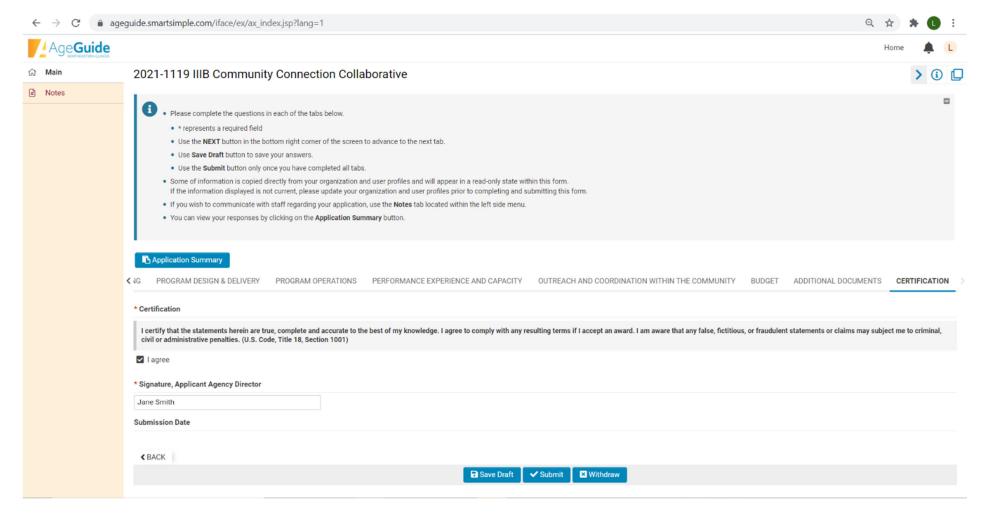
Once the budget is completed, uploaded and has been populated, proceed to the next tab by clicking on the tab or clicking "Next" in the bottom right corner.

**You can proceed to the next page without completing the budget, however, the application cannot be submitted without the budget being uploaded or populated.

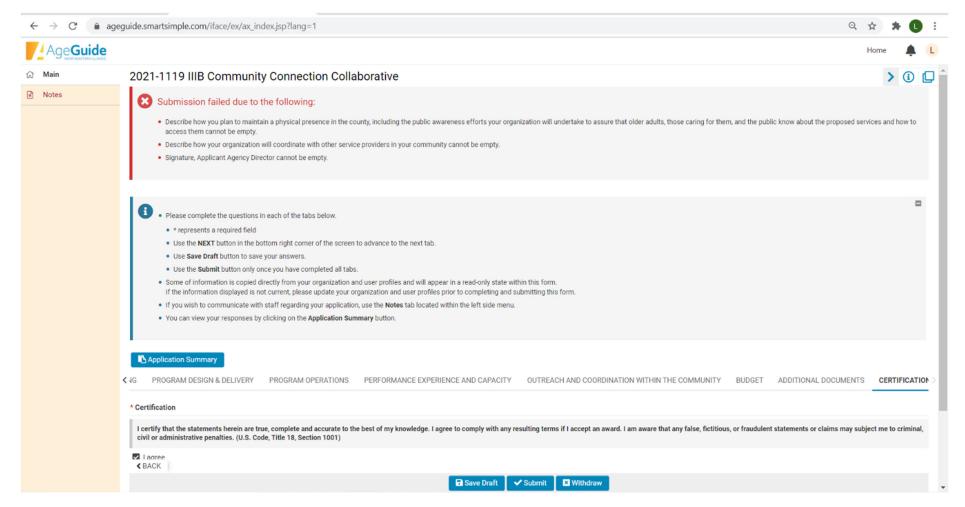
Additional Documents: Upload any other additional documents relevant to the application. These documents may include information requested on other pages or documents the applicant feels appropriate to support the application. Once documents are uploaded, proceed to the Certification Tab by clicking on it or clicking "Next" in the bottom right corner.



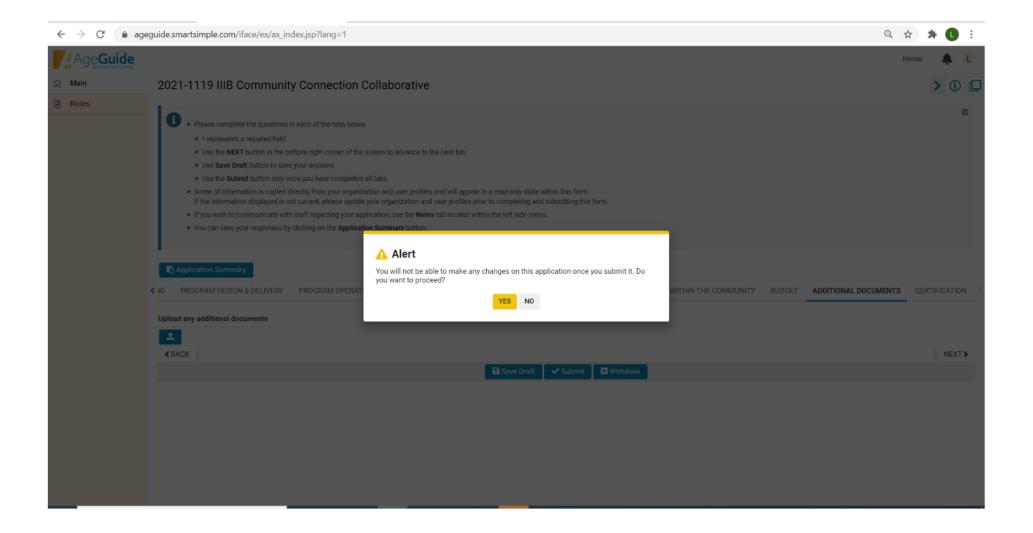
Certification: Review the certification, click agree and the agency director enters his/her name and click "Submit."



Submission Errors: For reference-if you click submit and have information missing, you will receive an error message informing you of which information is missing. As you go back to correct errors, the errors messages will disappear.



Once you hit submit, you will see a pop up window confirming you want to continue. Click "Yes" if you are ready to submit your application.



Submission Confirmed: Once you have officially submitted your application you will see the screen below. Click "Home" to return to the home page where you can review and complete other applications.

Submission Successful Application submitted successfully.

In addition, you will receive an email confirming receipt of your application. Please check your "junk" folder for this notice.

From: <noreply@smartsimple.com>
Date: Thu, Feb 25, 2021, 4:15 PM
Subject: Application Received
To: <bri>brianne.moser@gmail.com>

Dear Brianne,

We have received your final grant application. Please see the attached PDF for a summary of the information submitted. We will be reviewing the application and will notify you should you be asked to proceed.

Best regards, AgeGuide Northeastern Illinois Grants Management

Notice of Funding Decision

Award decisions will be determined by mid-August. Applicants who are approved for funding will receive an email notice generated from SmartSimple. These emails will arrive from the address noreply@smartsimple.com. Please be sure to check your "junk" folder throughout August, as the emails may be sent there.

Following the email notice, an official Notice of Grant Award will be sent to approved applicants. This NGA will contain detailed award information and terms. NGAs will be generated and sent through the SmartSimple platform. Applicants will be required to digitally sign and return this NGA.

Should your application be declined, you will receive communication directly from AgeGuide.

From: <noreply@smartsimple.com>
Date: Thu, Feb 25, 2021, 4:15 PM
Subject: Application Approved
To:

Sprianne.moser@gmail.com>

Dear Brianne,

It is my pleasure to inform you that we have approved a \$86,810.00 grant to Testing Organization for 2021-1117 IIIB Legal, as outlined in the application provided to us. A grant agreement is forthcoming. In the interim, should you have any questions, please contact bmoser@ageguide.org.

We wish you every success with your important work, and look forward to hearing the results.

Sincerely,

AgeGuide Northeastern Illinois Grants Management