Y-USA ONLINE GRANT APPLICATION SYSTEM

Starting a SmartSimple® Application

GENERAL INSTRUCTIONS

- Any YMCA staff may start a grant application in SmartSimple on behalf of their YMCA organization. Staff should coordinate internally prior to starting a grant application – most grant opportunities can only have one application per YMCA in progress.

- All local Y grant applications must be officially approved and submitted **by the local Y CEO** in SmartSimple before the stated deadline for the application to be considered.

- Any questions about SmartSimple or the grants process can be directed to the Y-USA Grantmaking Team at grants@ymca.net.

LOGIN TO THE SYSTEM

1. Click on the portal link (https://yusa.smartsimple.com) to access the login window.


2. Use your email address and password and click **Login**. You are now on your home page. *If you do not have an account, click "Register Here".*

CREATE A NEW APPLICATION FORM

1. Once you log into your account, the application screen (the "Apply" page) opens as your homepage. This is where you can start a new application.

2. Using the down arrow, select the YMCA that you are applying on behalf of. You will be able to start applications only on behalf of your Primary YMCA and any affiliated YMCAs on your SmartSimple profile.
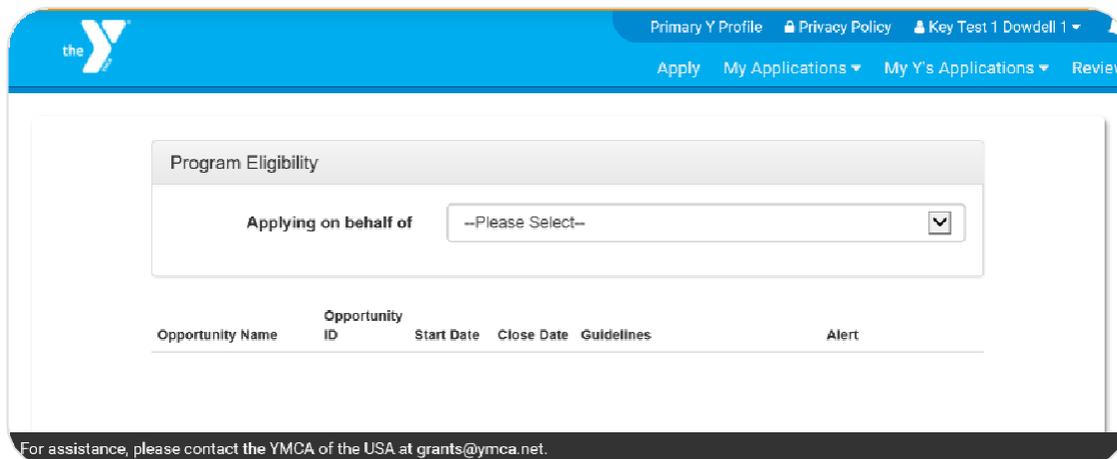

3. The available grants for the YMCA you selected will appear on the screen.
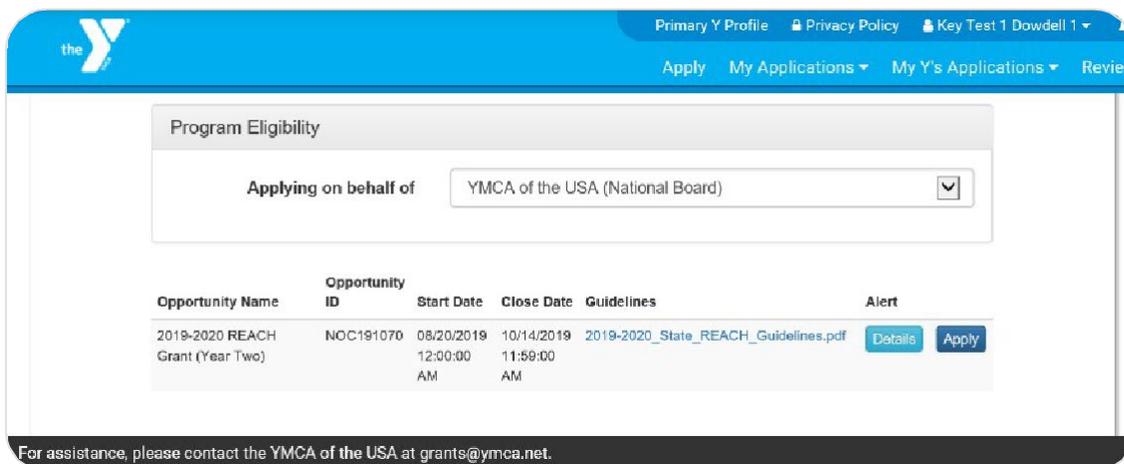
4. Carefully review the entries under Opportunity Name, Start Date, Close Date, and Guidelines (select to open).

5. Click the **Details** button to view additional eligibility requirements, if applicable.

6. Click the **Apply** button to start the application process.

7. If the application has an eligibility screener, you will be asked several brief questions confirming your Y's eligibility to apply. Complete the quiz and hit **Check Eligibility**. If you are found eligible, the screen below appears. Note: Not all grant opportunities include an eligibility screen.
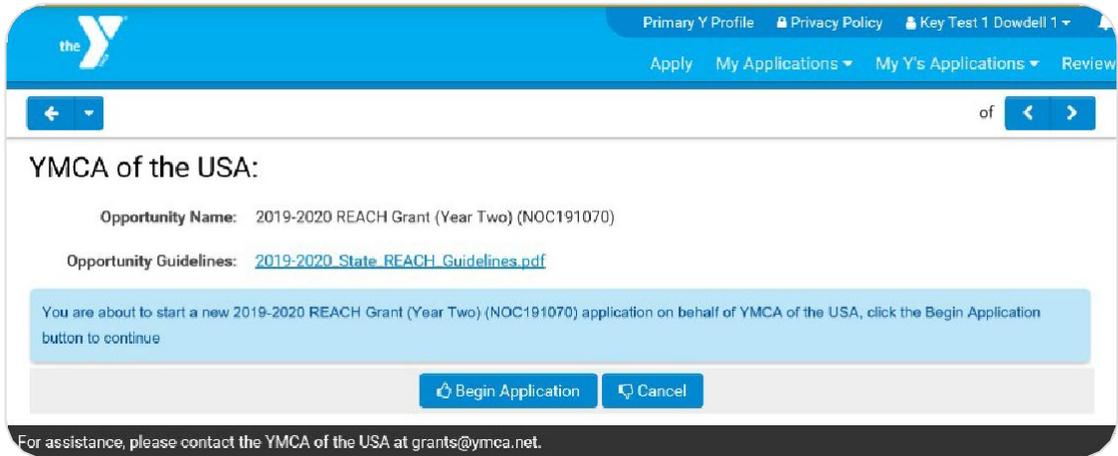
8. Select **Begin Application** to proceed. You will complete all required (*****) sections of the application.

9. Applications vary by opportunity. Please respond to all the prompts in the form and review all grant agreements.

10. At any time during the application, you can leave and return to the application later. Please remember to click **Save My Work** often.

11. Once you have completed your application, select **Save and Validate** to confirm your answers. Any errors will be indicated at the top of the screen in red.

12. To print your application, click **Print Form**.

13. A web version of your application appears in a separate window. Turn this web view of your application into a PDF by clicking **Export as PDF** at the top of the web view.
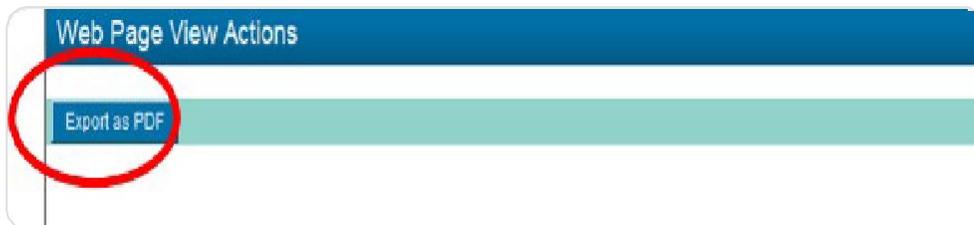
14. Once you have responded to all prompts in the application, click **CEO Review** to send this application to your Y's CEO for review and approval. Remember, the applying Y will need CEO approval **before** submission.


REMEMBER

All grant opportunities require active approval from the applying Y's CEO. When you click **CEO Review**, an email is sent to your CEO, alerting the CEO to the application. After reviewing and approving the application, the **CEO submits the application** on behalf of your Y in SmartSimple.

Applications must be submitted by the applying Y's CEO **before the stated deadline**.

15. After selecting CEO Review, the screen below appears. Please read all details carefully.
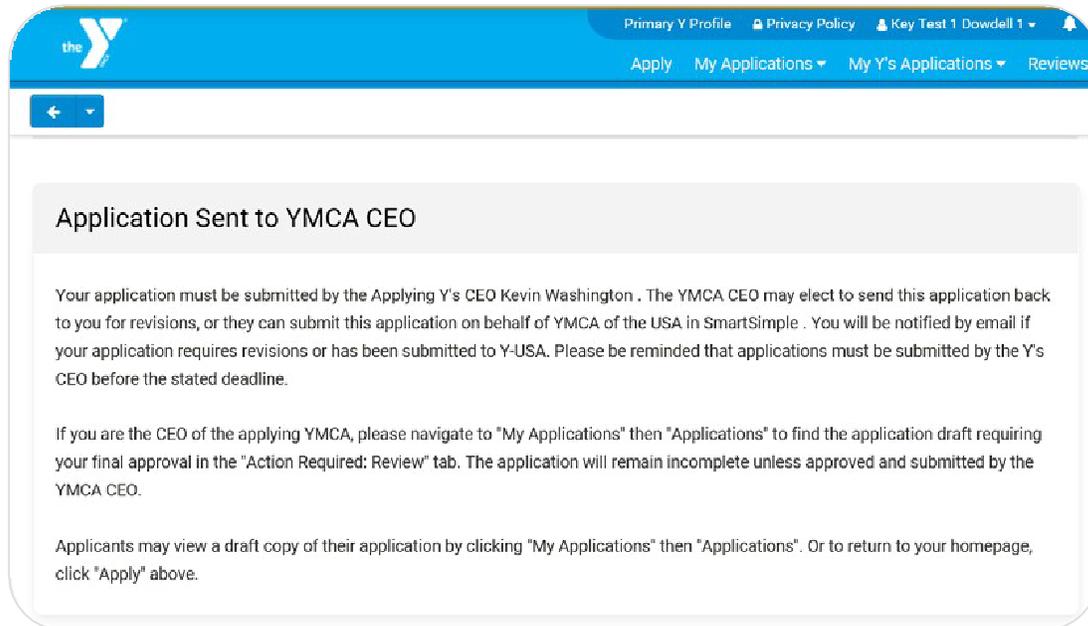
16. You can view the status of your application by selecting My Applications → Applications from the header menu.
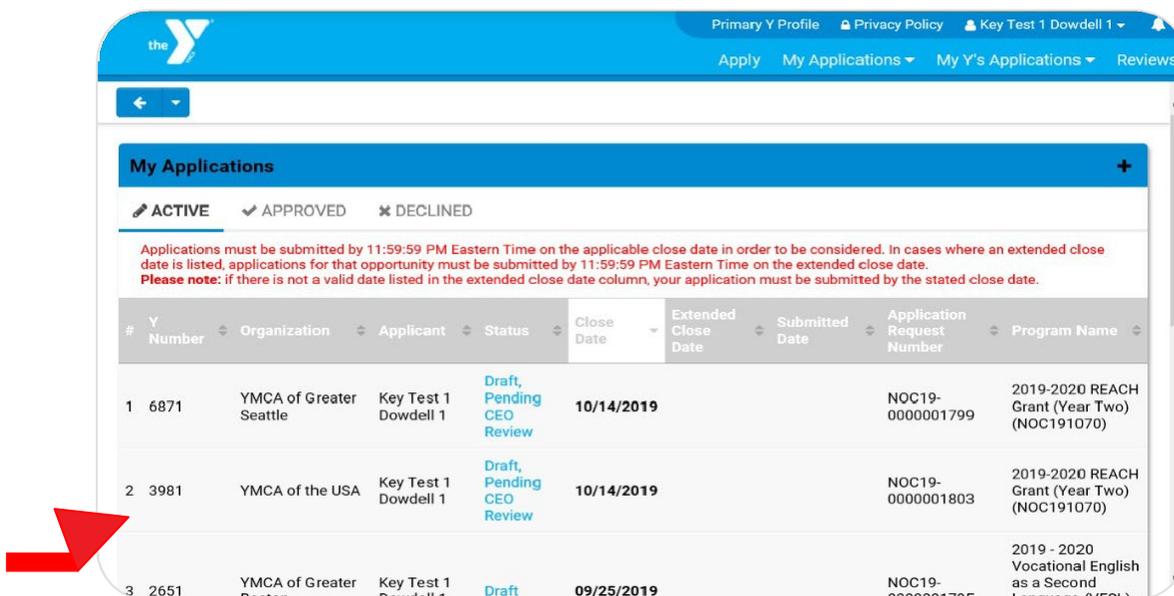
Y-USA ONLINE GRANT APPLICATION SYSTEM

CEOs: Approving a SmartSimple Application

GENERAL INSTRUCTIONS

1. All local Y grant applications must be officially approved and submitted **by the local Y CEO** in SmartSimple before the stated deadline for the application to be considered.

2. CEOs must log in with their official SmartSimple account using their email address as stated in Manage Our Y Profile (MOYP). CEOs may use the password reset option on the SmartSimple login page if they do not know their password.

3. Ys that need to update their CEO information in SmartSimple/MOYP should email fulfillment@ymca.net. CEO updates take effect in SmartSimple approximately 1-2 business days after MOYP is updated.

4. Any questions about SmartSimple or the grants process can be directed to the Y-USA Grantmaking Team at grants@ymca.net.

LOGIN TO THE SYSTEM AS A YMCA CEO

1. Click on the portal link (https://yusa.smartsimple.com) to access the login window.
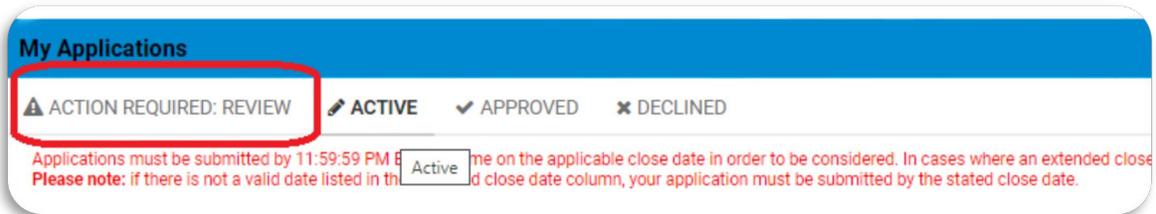
2. Login using your email address and password, and click Login. You are now on your home page.

CEO REVIEW AND APPROVAL OF APPLICATION

1. Click on **My Applications** in the top right blue menu and select **Applications**.
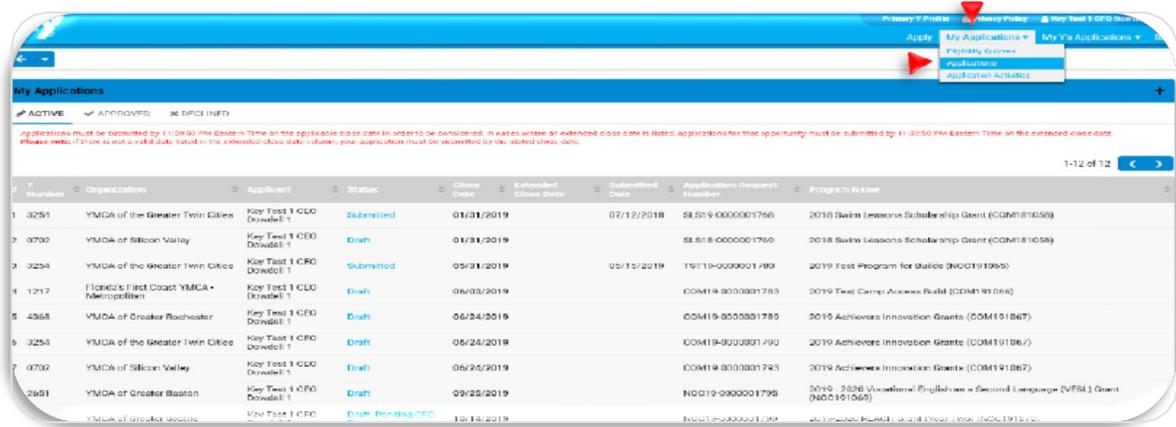
2. Applications pending CEO review are listed in the **ACTION REQUIRED: REVIEW** tab. These applications are listed in "**Draft, Pending CEO Review**" status.

3. Select the pending application to open it. You are now in the grant record pending your review and approval. Please review the full application and agreements.

4. On the bottom of the screen, the CEO is offered these options:
   - **Back to Applicant:** Click this button if additional comments and revisions to the application are needed. You can then send the application back to the applicant to complete this task. The application will then be sent back to the you (the CEO) for final review before submission.
   - **Approve and Submit:** Click this button to officially submit the application for final review. You and the primary applicant will receive an automatic email notification upon submission.
   - **Withdraw:** Click this button to pull/withdraw the application completely from the application cycle with no further review.