![CIRCLE OF SERVICE FOUNDATION — Supporting great organizations to enhance community, opportunity and well-being](logo)

How to Submit an Application in SmartSimple

Click here to watch the video on how to submit applications.

This how-to guide and accompanying video will give you step-by-step instructions on how to submit an application after determining eligibility of whether the Pre-Application or Full-Application form should be completed.

1. "Login to the grantee portal at https://circleofservice.us-1.smartsimple.com/ to access the home page. Two sections of tiles appear, each titled Applications (includes pre-applications or full applications) and Reports (assigned challenge grant or final reports).

2. In the "Applications" section, click on the tile "Apply Now"
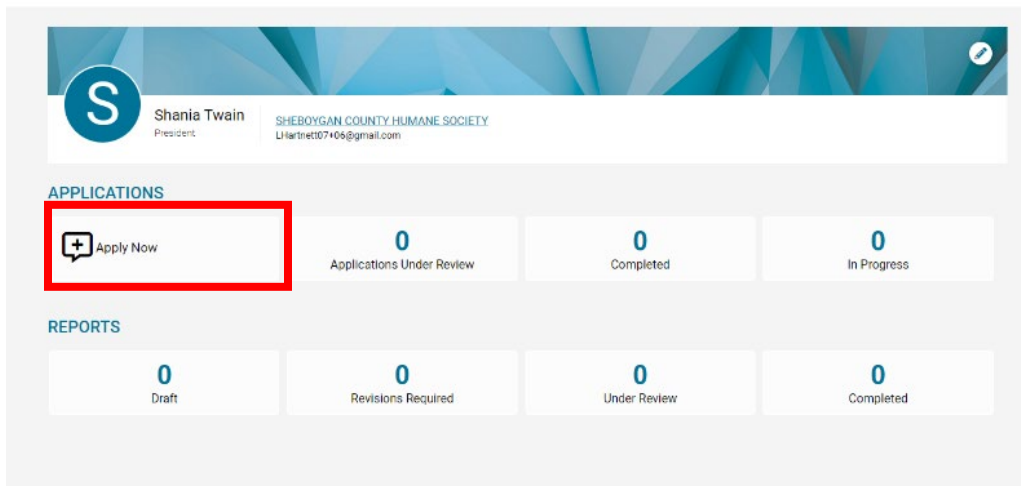
3. You will be prompted to respond to 1-2 question(s) to determine which application is appropriate for your organization at this time.

4. Click "Submit Eligibility".

5. Click "Yes" when the Alert box appears.

6. Based on your responses, the next screen will verify if you are eligible to apply. If so, the type of form you can begin working on will be the button you click. For example "Proceed to Pre-Application" or "Proceed to Full Application".

7. If you are clicking on "Proceed to Pre-Application" continue through steps 8-11 and STOP following the guide. If you are clicking on "Proceed to Full Application, continue with steps below except SKIP step 11 and follow the remaining guide.

8. Under the Pre-Application tab, review the Organization Contact Information and Primary Contact at the top for accuracy. If changes need to be made refer to the guide "How to update Contact or Org Profiles."

9. Provide responses as instructed for each question under the Pre-Application tab. Please note the portal does not autosave, so click "Save Draft" button often to ensure your data is saved.

10. Click "Click here to enter expenses" to complete the table with your organization and program expenses for the prior and current years, then click the "Save" and "Close" buttons to ensure data is completed.

11. When complete, click "Submit", then an automatic email will be sent to you confirming submission of the pre-application and a PDF for your reference. **(SKIP THIS STEP IF YOU ARE COMPLETING A FULL APPLICATION)**

12. Click "Save Draft" button, then click on the "APPLICATION" tab to provide response as instructed for each question. Please note if a red asterisk appears, a response is required.

13. If you would like to invite any collaborators to this work on this application during the same time with you, please refer to the guide "How to complete a Collaborator Invitation".

14. Continue to provide responses as instructed for each question under the "BOARD OF DIRECTORS" tab. Please note the portal does not autosave, so click "Save Draft" button often to ensure your data is saved and if a red asterisk appears, a response is required.

15. Continue to provide responses as instructed for each question under the "REVENUE AND EXPENSES" tab. Please note the portal does not autosave, so click "Save Draft" button often to ensure your data is saved and if a red asterisk appears, a response is required.

16. Make sure to accurately provide budget by "Click here to enter expenses" to complete the table with your budget details as instructed, then click the "Save" and "Close" buttons to ensure data is completed. Please note the following:

    a. Under TYPE OF REVENUE, click the PLUS button and select the type that is applicable and repeat step for different revenue types.
    b. Under TYPE OF PROGRAM REVENUE, click the PLUS button and select the type that is applicable and repeat step for different program revenue types.

17. Continue to the last "ATTACHMENTS" tab to upload the document required with the red asterisk. Please note steps on how to upload:
    a. Complete steps for each document separately then click the Upload button to open the File Manager.
    b. Click the Browse button to locate the file(s) on your computer.
    c. Complete the upload by clicking Open on the File Manager window.
    d. After you have confirmed the file(s) is uploaded, click the "X" at the top righthand corner to close the File Manager window.

18. When all tabs have been filled out to completion, click "Submit" at the bottom of the page. If you have any missing required information, the form will list the fields to allow you to click and be redirected to each question and complete as needed.

19. Once you've submitted your application, an automatic email will be sent to you confirming the re-submitted application and a PDF for your reference.

20. If a Circle of Service staff asking for clarification for your application, an email will be sent to you, please refer to the guide "How to Revise an Application if Requested by COSF."