

How to complete your budget in your full application

in SmartSimple (Section does not apply to pre-application)

<u>Click here</u> to watch the video on how to complete your budget information in your application

This how-to guide and accompanying video will give you step-by-step instructions on how to fill out your budget information.

1. To fill out your budget information for an application, go to the tab of your application labeled "Revenue and Expenses." At the top of this area, you'll see the "Budget" header. Under there, click the blue button labeled "\$ Click here to enter the budget."

	 The portal 	does not autosave. (Click the Save Draft button of	en to ensure your data is saved.					
		 Do not use your browser's back key, as you will lose any unsaved data. 							
	Please ma	ke sure to complete :	all mandatory questions below	N.					
	• To navigat	e to sections on this	form, either click on tabs at th	e top or at the bottom of page, cli	ick "Back" or "Next" to redirect between e				
	 Some of In 	formation is copied	directly from your organizatio	n and user profiles and will appea	r in a read-only state within this form. Ho				
	Click the A	pplication Summary	button for a PDF version of th	e application.					
	 The Pre-Ap 	plication questions	can be updated if needed, how	vever, it's not mandatory for this ta	ab to be revised.				
ال م	pplication Sun	nmary							
	pplication Sun	APPLICATION	BOARD OF DIRECTORS	REVENUE AND EXPENSES	ATTACHMENTS				
	PLICATION		BOARD OF DIRECTORS	REVENUE AND EXPENSES	ATTACHMENTS				

2. A new window appears to allow for data regarding three years of your Organization Revenue, Expenses, and Net Assets. If your request includes budget information for a specific program, you are required to enter your Program Revenue and Expenses here as well. 3. To add separate revenue line items (both organization and program): in the revenue portion of this screen, press the + button, to add as many revenue rows needed.

Organization Revenues

 Please click the Add Button to determine the Revenue types. 	Type of Revenue and enter the amount for each field. Contin	ue to click Add Button for each type of reven	ue to provide all relevant						
Private Revenue includes individuals, corporations and foundations. Do not include the value of in-kind goods or services.									
Government Revenue includes local, state and federal grants. Do not include reimbursement for services rendered, such as Medicare reimbursements.									
 Fee-For-Service Revenue includes insurance reimbursements, third-party payments, and government reimbursement for services rendered. 									
 Other Revenue includes interest, investment in as private, government, or fee for service revenues 	ncome, or allocations from a national affiliate or federated co nue above.	ntributions for any given year. Do not include	any revenue that was counted						
Type of Revenue	Revenue Last Year	Revenue Current Year	Revenue Next Year						
	\$0.00	\$0.00	\$0.00						
+									

4. Once you've added a row, you will see a drop down under the "Type of Revenue" column. Select the type of revenue you plan to complete with a total figure each column that references Last Year/Current Year/Next Year for each cell.

If needed, click "+" for additional type of revenue. Please note: if your organization does not have a certain type of revenue, you do not need to add a zero for all references to Last Year/Current Year/Next Year.

- 5. After you've entered your revenue information, move on to enter your expenses.
- 6. You will not need to enter any surplus/deficit information. Our system will auto-populate that information based on your prior entries.
- 7. Please enter your net asset information.
- 8. If appropriate, enter your revenue information for the program you are submitting this application. To see how to enter the revenue rows, go back to step 3.
- 9. Once you've entered all the organization budget information, and program budget information (if applicable), click "save" at the bottom of the page. You can also click "clear" if you need to start over. To exit out of this screen, click "close" or the "x" button at the top right.

S	0.00		\$0.00	
Save	Clear	Close		

10. You can now continue to fill out your application.