

## WEBVTT

1

00:00:03.730 --> 00:00:17.819

Laurie Stevens: Welcome to the video on how to submit a letter of intent and full application in SmartSimple for the UC Cancer Research Coordinating Committee, or CRCC, Faculty Seed Grant.

2

00:00:18.490 --> 00:00:24.329

Laurie Stevens: In this video, we will review key steps to complete your application in SmartSimple.

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00:00:24.670 --> 00:00:28.680

Laurie Stevens: Please note that not all SmartSimple steps will be covered.

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00:00:28.980 --> 00:00:37.339

Laurie Stevens: Everything covered in this video is detailed in the RFP and the application instructions posted in SmartSimple and on our website.

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00:00:37.680 --> 00:00:40.690

Laurie Stevens: So be sure to review those closely.

6

00:00:44.800 --> 00:00:53.460

Laurie Stevens: You must prepare and submit your letter of intent online, Using SmartSimple at [rgpogrants.ucop.edu](http://rgpogrants.ucop.edu).

7

00:00:53.680 --> 00:00:58.599

Laurie Stevens: This link and detailed instructions are available on CRCC's website.

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00:00:59.670 --> 00:01:07.939

Laurie Stevens: All users accessing SmartSimple for the first time should click Register Here to register and create an account.

9

00:01:08.260 --> 00:01:10.500

Laurie Stevens: We'll talk about this in the next slide.

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00:01:11.200 --> 00:01:27.839

Laurie Stevens: Applicants who have previously registered with SmartSimple, or are returning to complete an in-progress LOI should enter their username and password under Login, and click the login button on the SmartSimple homepage.

11

00:01:28.330 --> 00:01:35.040

Laurie Stevens: If you run into login issues, please contact us. We'll remind you of that email address at the end of this webinar.

12

00:01:37.350 --> 00:01:40.999

Laurie Stevens: This is the screenshot of the Register Here page.

13

00:01:41.470 --> 00:01:48.850

Laurie Stevens: Enter all details, click the I Am Not a Robot box, and then click Submit to create your account.

14

00:01:49.260 --> 00:01:58.399

Laurie Stevens: Once an account is created, return to the main SmartSimple page and log in using your account information.

15

00:01:59.000 --> 00:02:05.620

Laurie Stevens: If you complete this form and receive a message indicating that an account with your email address already exists.

16

00:02:05.860 --> 00:02:12.009

Laurie Stevens: Return to the main login page and click the Forgot Password link.

17

00:02:14.470 --> 00:02:25.019

Laurie Stevens: Once you are logged into SmartSimple, you can access the LOI materials by clicking on the Available Funding Opportunities tab in the top menu bar.

18

00:02:25.420 --> 00:02:29.550

Laurie Stevens: You will see a list of all open funding opportunities.

19

00:02:29.930 --> 00:02:36.150

Laurie Stevens: Find the row that corresponds to the award type you're interested in, and click Apply.

20

00:02:39.710 --> 00:02:45.579

Laurie Stevens: Once you click on Apply, complete the eligibility quiz and review the helpful hints.

21

00:02:46.770 --> 00:02:58.270

Laurie Stevens: Click through the five section headings, title page, applicant or Principal Investigator, Project Information, Budget, and signature page, to complete the LOI.

22

00:02:59.540 --> 00:03:03.749

Laurie Stevens: Please note that you must click Submit LOI when you are done.

23

00:03:04.050 --> 00:03:09.339

Laurie Stevens: Otherwise, your LOI will only be saved in the system, but not submitted to us.

24

00:03:10.790 --> 00:03:14.530

Laurie Stevens: Once you've submitted an LOI, you will get an email confirmation.

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00:03:14.780 --> 00:03:23.790

Laurie Stevens: If you do not receive this email, first check your spam folder, then please contact us so we can confirm your LOI is submitted.

26

00:03:24.480 --> 00:03:39.520

Laurie Stevens: For the purpose of this video, we are not going to show you every section, but if you have questions or need guidance on how to complete each of the LOI sections, please refer to the instructions and contact us if you will need assistance.

27

00:03:41.830 --> 00:03:48.139

Laurie Stevens: To access your draft LOI, click the Home link in the top bar of the screen.

28

00:03:48.360 --> 00:03:54.440

Laurie Stevens: Note that you should, by default, land on this dashboard when you log into SmartSimple.

29

00:03:55.400 --> 00:04:00.849

Laurie Stevens: Then click In Progress Applications to access your draft LOI.

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00:04:01.530 --> 00:04:11.510

Laurie Stevens: After you have submitted an LOI, or full application, the record can then be found under Submitted or under Review Applications.

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00:04:14.470 --> 00:04:23.209

Laurie Stevens: Once you've received our email notification saying that your LOI is approved, you can then log in to SmartSimple and start your application.

32

00:04:23.620 --> 00:04:29.710

Laurie Stevens: Once you are in the system, you will be defaulted to the My Applications home screen.

33

00:04:30.030 --> 00:04:33.169

Laurie Stevens: Click on In Progress Applications.

34

00:04:33.950 --> 00:04:42.260

Laurie Stevens: Locate the LOI that you submitted to our program, and under the status column, it should say, Invited to Full Application.

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00:04:42.560 --> 00:04:45.599

Laurie Stevens: This is how you can check your LOI status.

36

00:04:45.860 --> 00:04:51.489

Laurie Stevens: If, as well, if you've submitted your LOI, it will say LOI submitted.

37

00:04:52.940 --> 00:05:04.280

Laurie Stevens: Once our staff approves your LOI, you will receive an email, and the next time you log into SmartSimple, you can click on Open to start the full application.

38

00:05:04.430 --> 00:05:09.149

Laurie Stevens: You will not have access to the application materials until your LOI is approved.

39

00:05:09.430 --> 00:05:14.120

Laurie Stevens: And the status changes to Invited to Full Application.

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00:05:16.160 --> 00:05:22.219

Laurie Stevens: Once you click on Open, the system will ask you to confirm your LOI information.

41

00:05:22.400 --> 00:05:31.050

Laurie Stevens: Click on the Continue to Full Application button at the bottom of the screen to access the full application materials.

42

00:05:33.240 --> 00:05:39.140

Laurie Stevens: The first step of the full application is the title page for you to edit your title and project dates.

43

00:05:40.290 --> 00:05:46.050

Laurie Stevens: Access the various application sections that appear horizontally across the top of the page.

44

00:05:47.110 --> 00:05:50.990

Laurie Stevens: You can always download instructions at the top of each page.

45

00:05:52.100 --> 00:05:57.910

Laurie Stevens: Download templates and upload required attachments in the documentation section.

46

00:05:58.580 --> 00:06:03.270

Laurie Stevens: Once you have completed each section, click Submit to Signing Official.

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00:06:03.770 --> 00:06:09.499

Laurie Stevens: Once the signing official submits the application, you will receive a confirmation email.

48

00:06:09.880 --> 00:06:13.550

Laurie Stevens: We will discuss the signing official's role in more detail.

49

00:06:14.000 --> 00:06:26.860

Laurie Stevens: Again, for the purpose of this video, we are not going through each of these sections. The instructions

on how to complete each section can be downloaded in SmartSimple, and if you have questions, you can always email us.

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00:06:27.360 --> 00:06:30.959

Laurie Stevens: However, we will go through a few sections in some detail.

51

00:06:31.200 --> 00:06:37.680

Laurie Stevens: Inviting personnel, Adding a signing official, and completing the budget.

52

00:06:39.960 --> 00:06:41.280

Laurie Stevens: Invite personnel.

53

00:06:41.850 --> 00:06:45.640

Laurie Stevens: Let's first take a moment to look at the Invite Personnel option.

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00:06:46.060 --> 00:06:49.860

Laurie Stevens: You will find the Invite Personnel tab on the left sidebar.

55

00:06:50.300 --> 00:06:59.820

Laurie Stevens: This section is optional and enables you to provide access to anyone you wish to participate in your application preparation or submission.

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00:07:01.930 --> 00:07:10.890

Laurie Stevens: In the Invite Personnel tab, to add a new user, click the plus button and enter their name and email, and select a role.

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00:07:11.350 --> 00:07:16.790

Laurie Stevens: Once you have added a user, click Save to save the user's information.

58

00:07:16.940 --> 00:07:21.410

Laurie Stevens: Then click Invite to send an invitation email to the user.

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00:07:22.050 --> 00:07:29.380

Laurie Stevens: The invitees will then receive an email invitation from the system with instructions to access the application.

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00:07:29.890 --> 00:07:35.030

Laurie Stevens: Add additional users by clicking the plus sign and entering the user's information.

61

00:07:35.140 --> 00:07:37.370

Laurie Stevens: Repeating for all users.

62

00:07:39.800 --> 00:07:43.180

Laurie Stevens: I want to highlight some items on the Budget tab.

63

00:07:43.310 --> 00:07:48.849

Laurie Stevens: Namely, adding institution contacts, and then completing the actual budget.

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00:07:49.740 --> 00:07:54.710

Laurie Stevens: To access those sections, Click on the Budget tab.

65

00:07:55.530 --> 00:07:57.100

Laurie Stevens: Then, click Open.

66

00:07:59.330 --> 00:08:03.650

Laurie Stevens: The first sub-tab within the Budget tab is Institution Contacts.

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00:08:04.000 --> 00:08:08.309

Laurie Stevens: Contracts and grant signatures will be collected electronically.

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00:08:08.410 --> 00:08:22.270

Laurie Stevens: You will submit the application electronically to your signing official, who must review and submit the application through SmartSimple by the application deadline. Please plan submission times accordingly.

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00:08:23.460 --> 00:08:32.409

Laurie Stevens: You must add the signing official, fiscal contact, and contracts and grants contact as institution contacts.

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00:08:32.679 --> 00:08:44.630

Laurie Stevens: To add the signing official, for example, locate the signing official field, start typing your signing official's name or email address, and select from the list that populates.

71

00:08:45.880 --> 00:08:57.070

Laurie Stevens: If you cannot find their name on the list, reach out to your department administrator or contracts and grants office to determine the name and email of your institution's signing official.

72

00:08:57.340 --> 00:09:08.180

Laurie Stevens: Then in the section, Can't find the contact you're looking for, click the Can't Find Signing Official radio button, then select the Add Signing Official button.

73

00:09:08.510 --> 00:09:13.030

Laurie Stevens: A new window will open for you to add the signing official's information.

74

00:09:13.490 --> 00:09:19.149

Laurie Stevens: Repeat these steps to add your fiscal contact and contracts and grants contact.

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00:09:19.740 --> 00:09:22.380

Laurie Stevens: Click Save Draft to save your work.

76

00:09:22.710 --> 00:09:29.750

Laurie Stevens: A read-only view of your entries will display on the Project Contacts tab.

77

00:09:32.530 --> 00:09:40.110

Laurie Stevens: The second sub-tab within the Budget tab is Budget Summary. Click this tab to access the budget form.

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00:09:42.040 --> 00:09:52.730

Laurie Stevens: Then, click Edit Budget, and a separate window will open to enter your budget details. We will discuss this page on the next slide.

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00:09:53.530 --> 00:09:59.040

Laurie Stevens: You can also click Back to Application to continue working on other sections of the application.

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00:10:00.250 --> 00:10:03.980

Laurie Stevens: At the bottom, you can click Save Draft to save your changes.

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00:10:04.220 --> 00:10:13.940

Laurie Stevens: Once you have entered all your institution contacts, budget figures, and justification notes, click Budget Complete to lock the Budget section.

82

00:10:16.070 --> 00:10:20.689

Laurie Stevens: Clicking Edit Budget will open this screen to enter budget details.

83

00:10:20.980 --> 00:10:25.500

Laurie Stevens: Scroll down to Personnel Costs, Salary, and Fringe.

84

00:10:25.740 --> 00:10:34.829

Laurie Stevens: Click the plus sign to add a newâ€¦ to add new personnel expenses, and indicate the dollar amount by each year requested.

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00:10:35.150 --> 00:10:38.080

Laurie Stevens: The total will calculate at the end of the row.

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00:10:38.290 --> 00:10:43.909

Laurie Stevens: When you click save, the expense will populate in the budget summary at the top of this screen.

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00:10:44.010 --> 00:10:47.850

Laurie Stevens: Repeat this step for each personnel expense in your budget.

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00:10:48.640 --> 00:10:56.949

Laurie Stevens: A text box is available under each budget category to provide the budget justification relevant to that particular category.

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00:10:57.200 --> 00:11:04.909

Laurie Stevens: There is no character limit on the budget justification, though the expectation is that the justification is concise.

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00:11:05.750 --> 00:11:19.419

Laurie Stevens: Throughout the application, you'll see additional questions for which you are required to click a button that will open a separate window for you to enter information, such as project personnel and suggested reviewers.

91

00:11:19.820 --> 00:11:28.370

Laurie Stevens: Please refer to the application instructions for steps on accessing these windows, and contact us if you have questions.

92

00:11:31.240 --> 00:11:43.819

Laurie Stevens: Once all online questions and downloaded templates have been completed and uploaded to SmartSimple, the application is ready to be submitted to your institution's signing official.

93

00:11:44.020 --> 00:11:48.619

Laurie Stevens: You must click Submit to Signing Official to complete this step.

94

00:11:48.990 --> 00:12:01.410

Laurie Stevens: Your institution signing official will receive an email notification to log in, review, and either submit the application, or send the application back to the applicant PI for revision.

95

00:12:01.970 --> 00:12:07.459

Laurie Stevens: Note, the signing official must complete this step prior to the application deadline.

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00:12:07.630 --> 00:12:10.979

Laurie Stevens: Please plan submission timelines accordingly.

97

00:12:11.410 --> 00:12:14.410

Laurie Stevens: If the signing official's submission was successful.

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00:12:14.570 --> 00:12:23.600

Laurie Stevens: A confirmation message will appear on the screen, and a confirmation email will be sent to the applicant PI and to the signing official.



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00:12:25.950 --> 00:12:36.249

Laurie Stevens: And here are our email addresses. For SmartSimple and administrative support, please email rgpogrants at ucop.edu.

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00:12:36.380 --> 00:12:43.229

Laurie Stevens: And for programmatic questions, you can reach us at UCRI at uclop.edu.

101

00:12:46.010 --> 00:12:50.979

Laurie Stevens: We look forward to receiving your proposals. Thank you.