CMCOA – SmartSimple Best Practices

- How to register for the website
    - Begin with Organization, then add User
        - From the log in screen https://cmcoa.us-1.smartsimple.com/, under New to the System?, click Register.
        - Select the appropriate entity type and follow the prompts to register.
            - US Non Profit Organizations can look up their information through the IRS portal – will populate information automatically.
            - All other types will need to enter their information manually.
- Website navigation
    - Clicking on either the CMCOA logo or the Home button will take you back to the beginning Home page
    - Profile button in the upper right hand corner
- Organization information, including Agency Fiscal Capacity information, under your profile
    - Do this section first because information will be pulled for multiple locations within the application
    - Must complete both the General section and Agent Fiscal Capacity section before saving
    - Phone numbers need to be plain numbers with no special characters (no parenthesis or dashes)
- Then begin application.
    - Save often, at a minimum of after each section.
- Overview of each section and what to expect in each one.
    - Contact Information
        - Most of this data will pull from your Organization Information. If it's not showing up right away, Save the page. Once refreshed, the information may be visible.
    - Project Information
        - To select multiple counties, press Cntrl+ the counties desired.
        - The Agency Fiscal Capacity check box on the bottom of the page is located within the Organization Information in your Profile.
    - Application
        - This section includes a lot of forms to download, sign, and upload
        - Any of the uploads that require a signature are limited to PDF. If you are getting a red error message when uploading a document, double check to make sure that it is a PDF. For fields that do not require a signature, any file format is acceptable (ie Word, Excel, PDF, etc.).
            - The upload window will say what file types are allowed.
    - Application Narrative
        - Grant narrative and budget sections
            - Budget: must upload file type XLSX
                - "Save Draft" to update the information in the table in the application. (Not III-C)
            - May want to draft these sections in Word and copy them over.

After you Save Draft the first time, a left-hand menu will show up.

Main is the application.

Notes is a way to communicate with CMCOA staff within the SmartSimple portal.

Collaborators allows you to add additional writers on the application.

- Communication with CMCOA – Notes function
    - Press the blue/white add button on the top to add a new Note. Type your message and Save.
    - Notes are pushed to Amanda Schindele and Laura Hoffman to respond.
- Collaborators
    - Press the blue/white add button on the top to add a new Collaborator.
        - Include First Name, Last Name, Email, and Role.
        - Pressing the Save button will keep the new Collaborator in the Draft status. Invite will send them an invitation to collaborate on the proposal.
            - You may add multiple Collaborators and then invite them all at the same time with the Invite button.
            - Collaborators will receive an email requesting them to Accept or Decline the invitation to Collaborate. Once accepted, those with an account will be able to log in and see the application. Those who do not have an account will be directed to create one.
    - When one person is editing, the application will be locked so others may not edit at the same time.
        - This record is locked. Checked out by User Name (June 5 2023 1:41PM)
        - [Undo Checkout]

- At the end of the application process, the application submission is saved as a single PDF document that the applicant can download or print, as desired. In addition, an email is sent to the address on file with the same file attached.