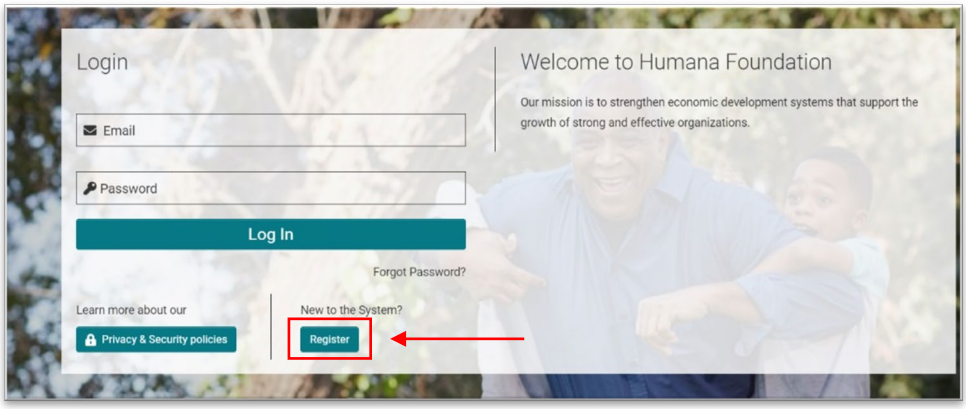
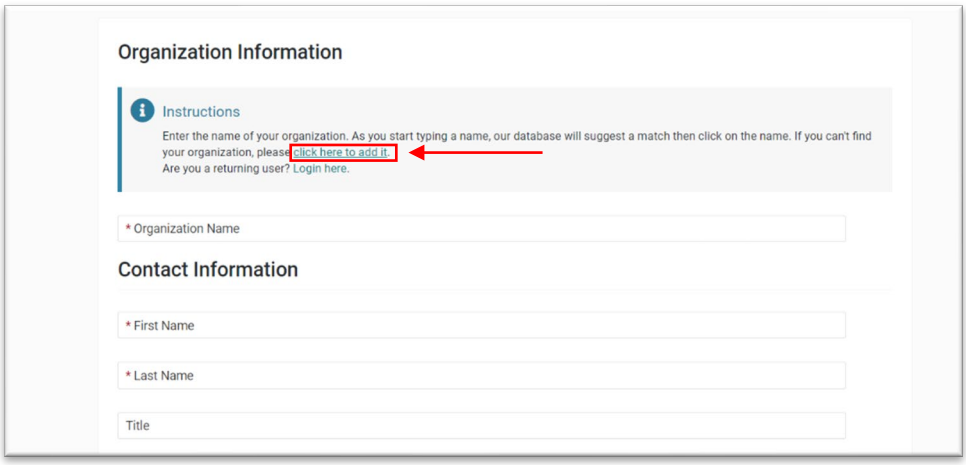
HUMANA FOUNDATION: SMARTSIMPLE [USER GUIDE]

Updated: 01/20/25

CREATING YOUR ACCOUNT



- Visit log-in page (SmartSimple | Humana Foundation) and click "Register" at bottom of screen.
- On next page, select "US Registered Non-profit" or "Fiscally Sponsored Organization" for your organization. Users selecting US Registered Non-profits can type their organization name in the appropriate search bar on the next screen and press "enter" to see available results.



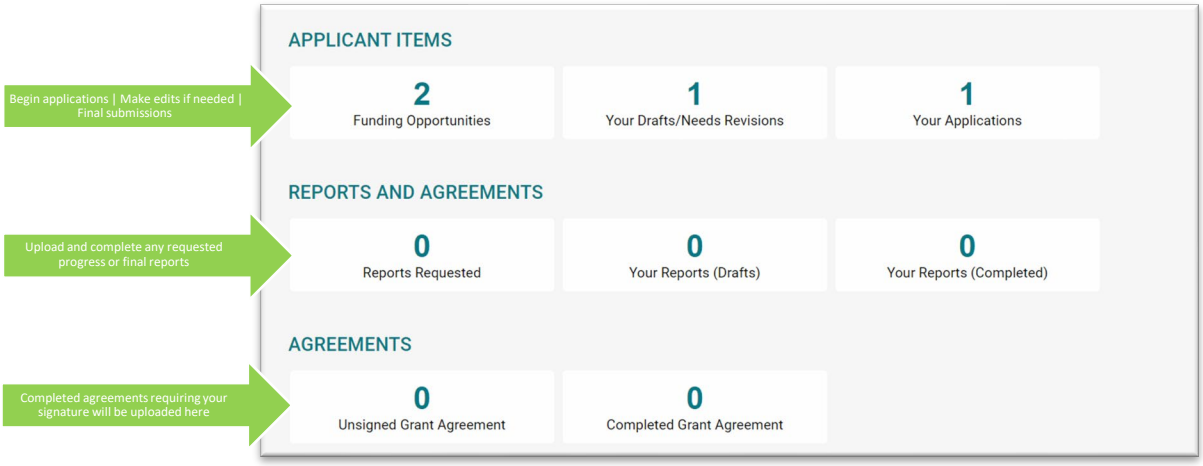
- Fill out corresponding fields on the page with contact information for your organization. If you are registering as a Fiscally Sponsored Organization and your organization name does not auto-populate in the "Organization name" field on the landing page, you can add your organization to SmartSimple by selecting "click here to add it." (see screenshot above)

  NOTE: The contact information you provide on the registration page will serve as the primary email and phone number for your account within SmartSimple. All communication from the SmartSimple system and Humana Foundation staff will be sent to this address or phone.

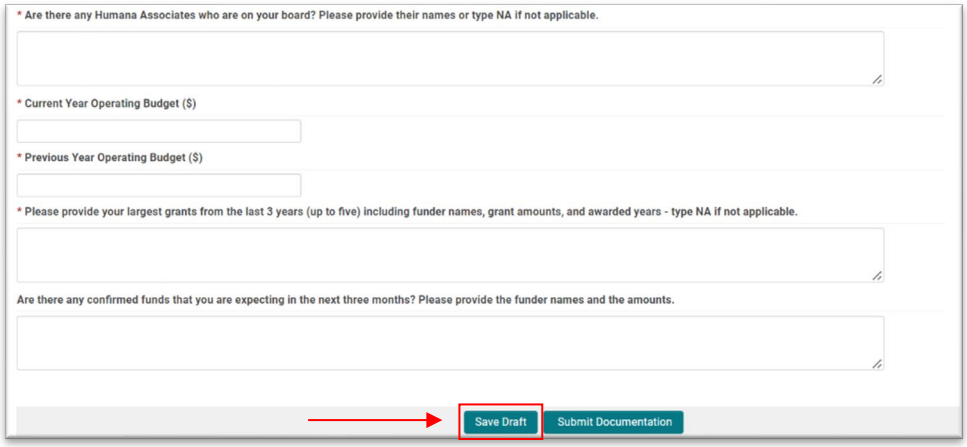
- When you have completed the required fields for registration, click "submit" at the bottom of the page. Your registration is now complete

ACTIVATING YOUR ACCOUNT & LOGGING INTO SYSTEM

- Upon completing registration, an activation link will automatically be sent to the email address listed on your organization's profile. Follow the link in the email to set up an account password.
- Set a password that meets the system requirements, complete the CAPTCHA at the bottom of the page and click "submit."
- You will be redirected to your homepage in SmartSimple:



- Click just below the top header bar on the link for "profile."
- Scroll down to view all required options on profile. Complete the required fields and click "save draft" along bottom bar of screen:



- After saving draft, click "submit documentation" to complete registration for your organization.

COMPLETING A GRANT APPLICATION (PHASE 1)

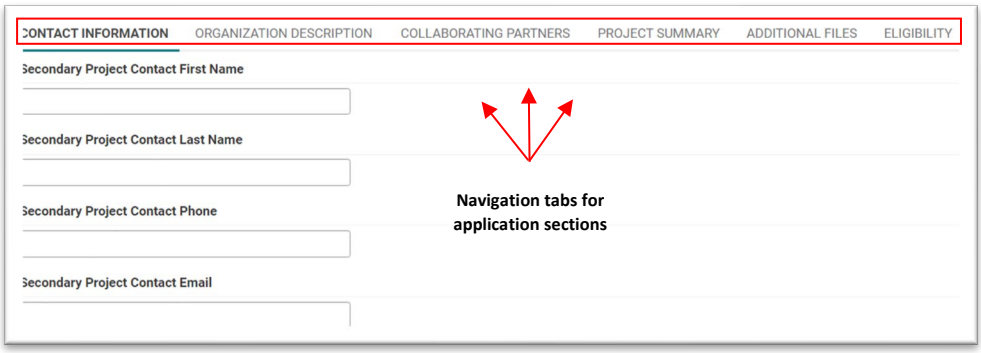
- Your homepage in SmartSimple will show current available funding opportunities for your organization. Click the "Funding Opportunities" box to view a complete list of open grants.

- Select the "General Grant" option.

  NOTE: Each grant requires completion of a prescreen check that verifies appropriate qualifications for funding. Users are unable to begin a grant application until successful completion of the screen.

- Fill out the brief prescreen questionnaire on the next screen and click "check eligibility" in the bottom bar of the page.

- Upon successful completion, SmartSimple will load into the application page for the selected grant. Users should see a screen similar to the following image:



- Fill out the requested information on the current screen of the grant application and click "save draft" in the bottom bar of the window.

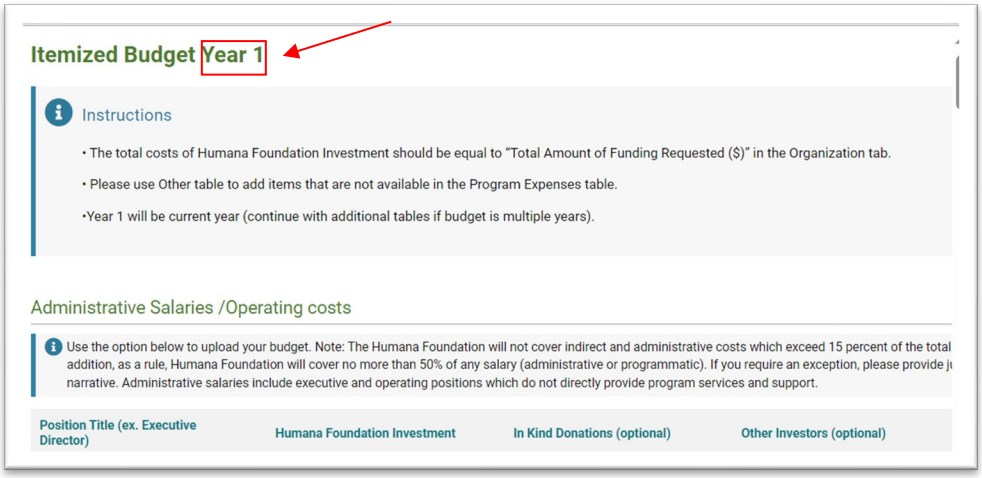
- Complete the full grant application by navigating through each tab (highlighted in red in the above picture) and providing the required information. **USERS SHOULD CLICK "SAVE DRAFT"** in the bottom bar of the window each time they complete a new tab in the grant application.

- **Note,** In the **"budget" tab,** <u>you must click **"open budget form"** at the bottom of the screen to load into SmartSimple's built-in budgeting tool.</u> All budgets must be submitted through SmartSimple's budget tool to properly log data for future progress reports.

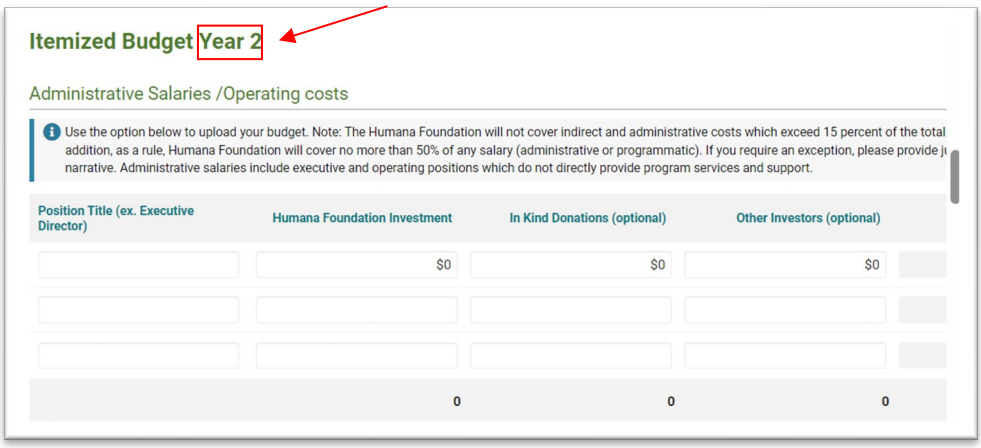
  TIP: If your application includes <u>**a multi-year budget,**</u> once you open the budget tool, you will fill out separate tables for each year of your proposed budget (see image on following page). Begin your budget with your current calendar year in the table labeled "Itemized Budget Year." Applicants then have the option of submitting up to a five-year budget in SmartSimple

See next page for budget example

Multi-Year Budgets: Upload budget for current year in "Year 1" table



Multi-Year Budgets: Use new table (Year 2, etc.) for next year(s) of budget



- After completing your budget, click "save" in the pop-up window once you have completed your budget and "close" to exit the tool -- Your application should now include an itemized table of your budget.

- Once you have completed each of the required tabs and information boxes, click the "submit application" button (there is a check mark next to the button) at the bottom of the screen.

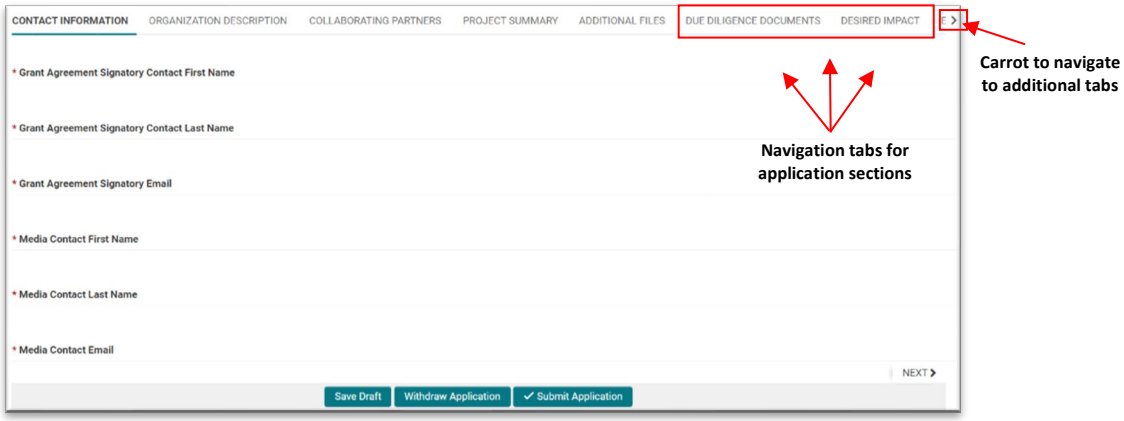
  NOTE: You application will no longer be editable after you click "submit application." If you submit your application by mistake, or require additional edits after your submission, contact the Humana Foundation at humanafoundation@humana.com.

- Congratulations, you have completed phase 1 of the application process. There is no additional action required on your part. A Humana Foundation staff member will contact you with next steps or notification your application has not been selected to advance to the next stages.

COMPLETING A GRANT APPLICATION (PHASE 2)

- If your project is selected to advance to the next stage of the application process, you will receive an email with instructions for beginning Phase 2.

- Complete the same process for logging into the system as previously in Phase 1. Locate your application in the Your Drafts/Needs Revisions bucket in the top row of your home page and click the "open" button next to your application.



- You will now have access to the additional tabs of "Due Diligence Documents," "Desired Impact," "Evaluation Plan" and "Budget." All tabs will likely not be visible when you load into the page. To access the additional tabs, click the right facing carrot **as noted in the above image.**

- Follow each question in the additional tabs carefully as several questions include additional, follow-up responses that appear below the original question. Many of these follow-up options are based specifically on your selections in the original question.

- If you have questions while completing your application, you are encouraged you to use the "Notes" section, which is located on the left column of your application page. Once you click notes, select the "+" icon, fill out the provided fields and click "save" at the bottom of the screen. You will also navigate to this screen if Foundation staff posts a note to your application or reply to your original note.

- Click "submit" to complete your application submission. You will receive a notification that the application was submitted successfully.

GRANT APPLICATION REVISIONS

- In certain circumstances, Humana Foundation staff may require additional information or revisions on your grant application. You will receive an email notifying you of requested updates to your application and your requested revisions will be located in the notes section of your application.
- Log in to SmartSimple via the home page and click the "your drafts/needs revisions" section on your home page. Open the "Notes" section, which is located on the left column of your application page. Once you click notes, you will see any notes posted to your application.
- Make the adjustments to your application as indicated in the notes from Foundation staff. When finished with the revisions to your application, click "submit application" at the bottom of the screen. You can also make the requested revisions, click "save draft," return to the notes screen and click the "+" icon to post a follow-up note to Foundation staff. This will continue the dialogue with Foundation staff and allow you to post additional questions for staff.

GRAT APPLICATION COMPLETE

- Congratulations, you have successfully submitted your finalized application and/or completed necessary revisions to complete your application. Your application will now be “locked” and you are unable to edit any of the information, unless Foundation staff approves or requests additional changes.
- You application, while un-editable, can always be viewed by navigating to your home screen and clicking the “your applications” bucket in the top row of the landing page.
- You can contact Foundation staff with questions via the notes tab in the left column of your application page. Click the “+” button to add a new note for Foundation staff. In addition, you can also email your Foundation staff contact directly, if a staff member has reached out to you during your application process.

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*You have now completed your application process in the SmartSimple system. Your application will be found under the “**Your Applications**” section in the top table of your home page. Humana Foundation staff will contact you with any next steps.*