

EPA Research Programme 2014-2020

Quick guide to the SmartSimple on-line portal (making an application)

POWERED BY SMARTSIMPLE

Disclaimer

Please read this document carefully prior to using the on-line portal.

This document does not replace, but is complimentary to the following documents, available for download on http://www.epa.ie/pubs/reports/research/opencalls/currentcalldocuments/:

- 2017 Guide for applicants
- 2017 Terms and Conditions for support of grant awards
- 2017 Call Technical Descriptions

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More Information

For further information and assistance with the EPA on-line portal (SmartSimple), please contact: research@epa.ie

What is the purpose of this Guide ...?

This guide shows you how to use SmartSimple to make an application for a grant award.

For details of the topics in the call, refer to the relevant 'Call Technical Description'.

For hints and tips of what to include in the application upload and the budget template, refer to the '2017 Guide for Applicants'.

Click the links below to quickly navigate this document

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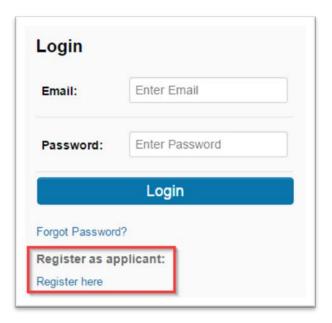
How to register as a user of the on-line system

Already registered...

If you have been awarded a grant since 2007, or have applied for a grant since 2010, you will already be a registered user of the system. Jump to: 'How to... Login to the system as a registered user'

New user...

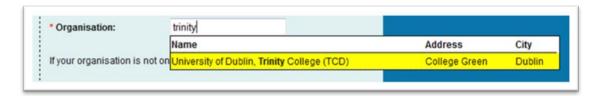
1. Open the registration form by clicking on the **SmartSimple home page**.



2. The applicant registration page will be displayed:



3. Begin by typing in your organisation name. (Applicants for research fellowships should enter the name of their proposed host third level institution). If your organisation is already registered in the system, it will appear (predictive text) once you begin to type.



If your organisation does not appear automatically, click on the link located under the field entitled Organisation Name as shown in the screenshot below. This will bring you to a registration page that will allow you to simultaneously register yourself and your organisation.



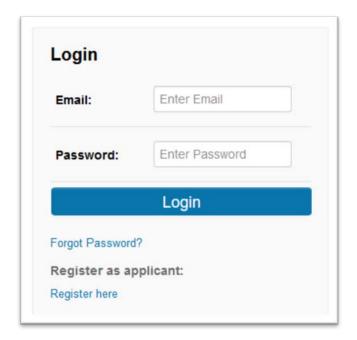
- 4. Complete all the boxes in the registration form.
- 5. Read the EPA privacy policy. Tick the box confirming that you have read and understood the privacy policy.
- 6. Click the 'Submit' button.



7. If you have completed the registration successfully, you will receive separate emails from donotreply@epa.ie providing you with login details and confirmation that your organisation has been set up on the system or a reason as to why it hasn't. Once you have received both emails you will be able to log in and use the system.

How to login to the system as a registered user

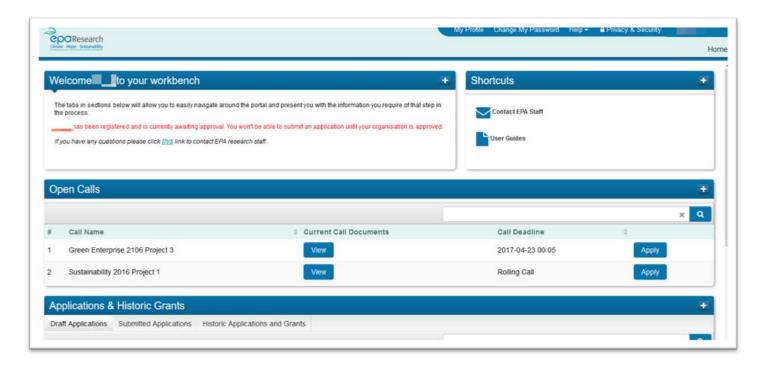
- 1. Click on the portal link:
- 2. This will open the login window below.



- 3. Login using:
 - a. Your e-mail address as your username.
 - b. Your password (in the registration confirmation email from donotreply@epa.ie).
- 4. Click **Login**, and you are now on your home page.
- 5. Forgot your password: click **Forgot password?**, enter your email address when prompted, and a password will be sent to you.

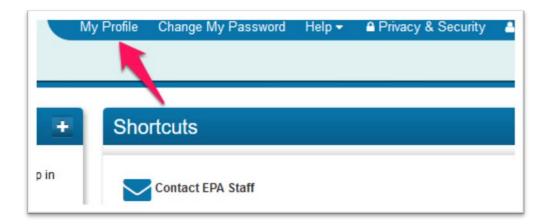
How to navigate through the icons on the home screen

Once you login, you will see your customised home page, which will be similar to the example below:

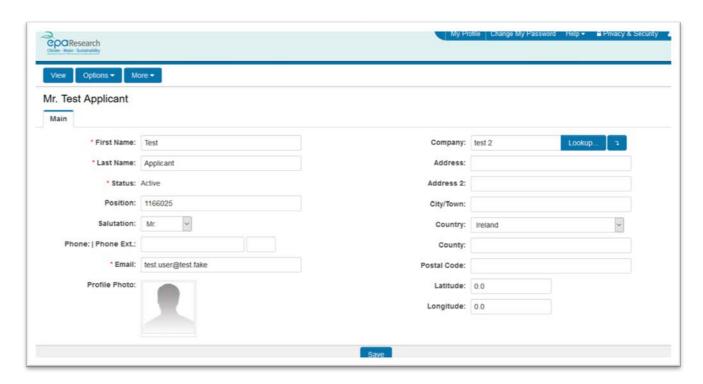


How to update personal information

1. To view your personal details, as held in the database, click the **My Profile** link in the header:



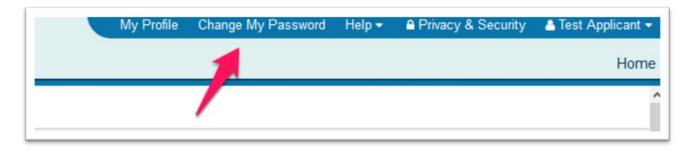
2. Your details will be displayed in an editable table:



- 3. Please ensure that you keep your details up-to-date.
- 4. To save any changes, press **Save**.
- 5. Please note that this is where to find your EPA PIN.

How to change your login password

1. You will be required to change your password the first time they login. You may also change it at any time by clicking on the **Change My Password** link in the header.



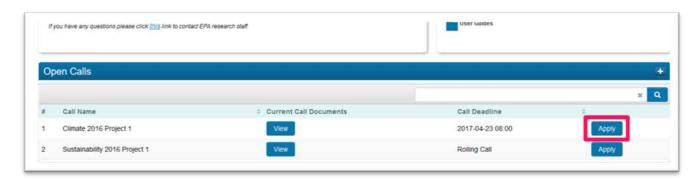
- 2. Choose a secure password that meets the following minimum-security criteria:
 - a. Minimum length should be at least six characters.
 - b. Includes a mix of symbols, letters and numbers.
 - c. Cannot be the same as your previous password.
- 3. Click **Submit** to confirm your new password.
- 4. Passwords are case sensitive.

How to create a new application

Applying for a grant is a 2-step process – it is your responsibility to ensure that the application is submitted before the application deadline, and also to ensure that your organisation approves your submission before the organisation deadline. You must have organisational approval before the proposal is valid.

Deadline dates are specified on the Home page.

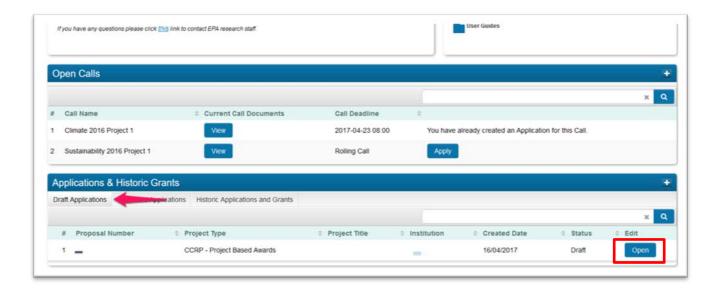
1. Click on the **Apply** button next to the call you'd like to apply to



- 2. Please ensure that you have chosen the correct Call Topic Reference as this determines the pre-population of a number of fields on the application form, including Pillar and Project Type. For some call topic references the project type will be pre populated as OPEN meaning that a medium scale or large scale project can be applied for. Details of the scale and duration of each project type can be found in the Guide for Applicants.
- 3. Click **Save Draft** to save your proposal and enable the upload buttons.

How to save the application as a draft, and return to it later

- 1. You can save your draft application at any stage by clicking **Save Draft**.
- 2. When you are ready to work on the application again, log back into the system.
- 3. Navigate to **Applications & Historic Grants** section on your homepage all your Draft applications will be visible under **Draft Applications** tab.



4. Click on **OPEN** button of the application that you wish to complete, and it will open in editable format.

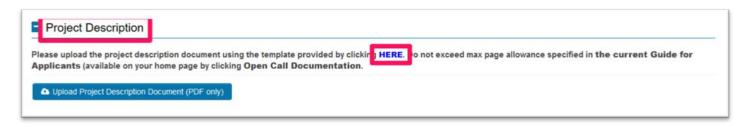
How to complete the on-line application

1. Please ensure that you complete all required on-screen fields. These fields come in several types, as outlined below:

Field type	What is required		
Mandatory	Mandatory fields are indicated by a red asterisk (*). You can leave a mandatory field blank while an application is it draft, however all mandatory fields must be complete before clicking 'submit'		
Dropdown menu	Select one of the options available from the dropdown menu.		
Free-text	Word limits are applied to free-text fields – please note if copying and pasting only words up to the maximum word-count limit will be copied into the field. Any extra words will NOT be copied.		
Tick-box	Select one of the options available from the tick boxes available on screen.		
Numeric	Only numeric characters (i.e. no commas, full stops or symbols) should be used in these fields.		
Auto-Populated	Some fields will already be auto-populated. You cannot amend such fields.		
Template uploads	Where a template is provided, it MUST be used to submit an application. Any deviation will invalidate the proposal. Before writing your proposal, take note of the specified fill format and page limits of the uploads.		

How to upload the project description

1. Scroll down the application screen to the **Project Description** section. Download the template by clicking 'HERE'.



- 2. Complete the template. Please refer to the **Guide for Applicants**, which provides tips and hints on making an application.
- 3. Save your completed template on your computer.
- 4. Click **Upload Project Description Document** (upload must be in pdf format only).



5. Select the file you wish to upload by clicking on the **Browse** button and choosing the appropriate file.



6. Attach your application form by clicking Upload.



7. If upload is successful, you'll be able to see your file as attached.



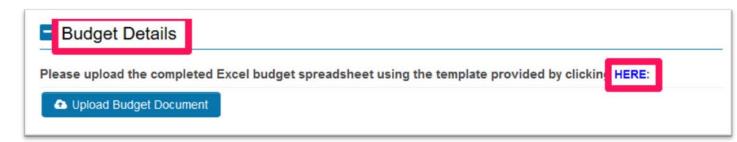
- 8. Click Close.
- 9. Finally, to complete the upload, press **Save Draft**.

Note: To replace / delete a document previously uploaded:

• Click the **Delete** button and Repeat steps 6-11.

How to upload the budget template

- 1. Scroll down the application screen to the **Budget Details** section.
- 2. Download the template by clicking 'HERE'.



- 3. Complete the template. Please refer to the **Guide for Applicants** and the instructions on the template.
- 4. Save your completed template on your computer in xls format.
- 5. Click Upload Budget Document.



6. Select the file you wish to upload by clicking on the **Browse** button and choosing the appropriate file.



7. Attach your application form by clicking Upload.



10. If upload is successful, you'll be able to see your file as attached.



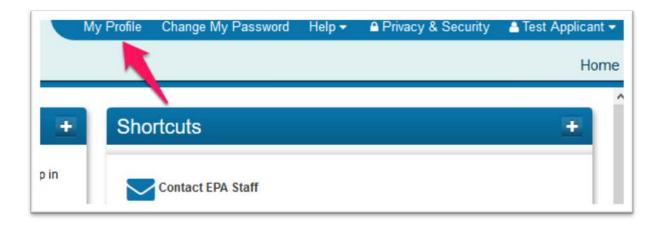
- 11. Click Close.
- 12. Finally, to complete the upload, press Save Draft.

Note: To replace/delete a document previously uploaded:

• Click the **Delete** button and repeat steps 6-11

How to find your EPA PIN number

- 1. Every registered user is given a unique personal information number (EPA PIN).
- 2. To find your EPA PIN, click My Profile link in the header.



3. Your EPA PIN number is shown at the bottom of the page.



- 4. The EPA PIN is used if:
 - a. You want to add a project participant to your application.
 - b. Another applicant wants to add you as a project participant to their application.

How to add a project participant (who has an EPA PIN number)

Only the lead researcher from a partner organisation should be added as a project participant

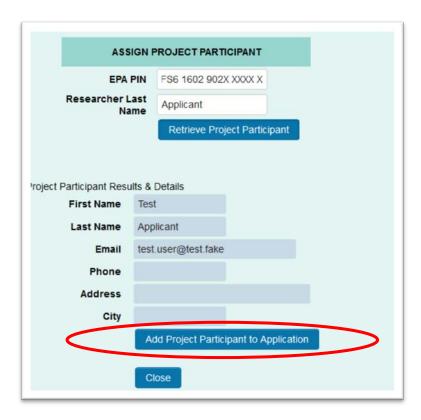
- 1. Ask your proposed participant to provide you with their EPA PIN.
- 2. On the application screen, scroll down to the section headed **Adding Project Participants** and their **Organisations**, then select the **Click here to Add a Participant** button.



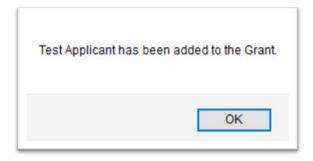
3. The Assign Project Participant window will open. Complete the EPA PIN and Researcher Last Name fields. Click Retrieve Project Participant.



4. The proposed participant's details will appear. If this is the person that you wish to add as a participant, click **Add Project Participant to Application**.



5. A confirmation pop-up message similar to the one below will appear on the screen.



- 6. Click OK.
- 7. Click Close.
- 8. To complete the update, click **Save Draft**.
- 9. The name of the project participant will now appear in the **Project Co-ordinator and Participants** table.

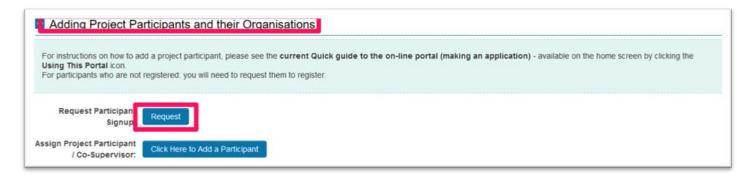


10. To add more project participants, repeat the steps 1-9.

How to add a project participant (who does not have a EPA PIN number)

If your proposed participant is not registered, you must invite them to do register.

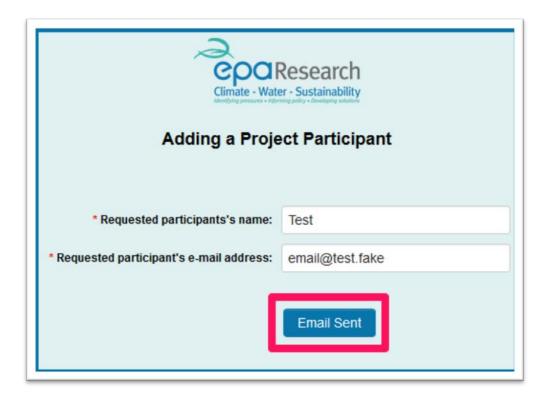
1. On the application screen, scroll down to the section headed **Adding Project Participants** and their Organisations. Click **Request**.



2. The **Adding a Project Participant** window will open. Complete requested fields. Click **Send Request**.



- 3. You must enter a valid email address for your participant, as the registration request is sent via email.
- 4. Send Request button caption will change to Email Sent.



- 5. Your proposed participant will receive an automated email asking them to register on SmartSimple.
- 6. It is recommended that you also contact the participant yourself, to ensure that they register on time. It is your responsibility, not the EPA's, to ensure all participants are registered.

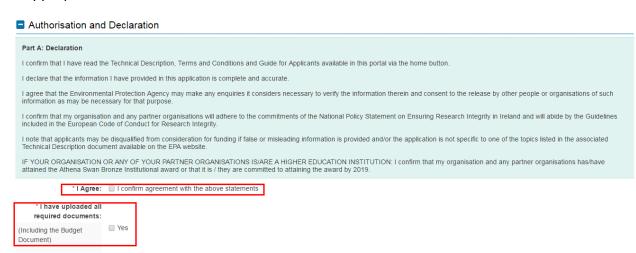
- 7. Once the proposed project participants have registered, ask them to send you their EPA PIN.
- 8. You can then add them as a participant (details of how to do so are contained in this Guide under the section titled ...Add a project participant (who has an EPA PIN number).

How to submit the completed application form for authorisation

1. Check that you have done the following:

I have double checked that the Call Topic Reference I selected (to create my application form) is correct
I have read the Technical Description, and my proposal is relevant to the project I am applying for
I have read the terms and conditions for support of grant awards award
I have completed all fields on the application screen
I completed and uploaded my project description, using the template from the portal.
I have completed and uploaded my budget form, using the template from the portal.
I have added all project participants (if necessary)

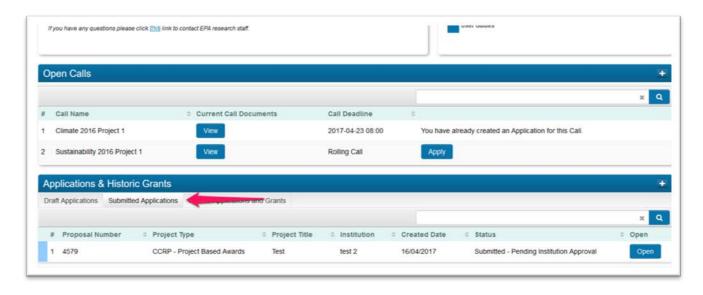
2. Then scroll down the application screen to the section titled: **Authorisation and Declaration**. Check the boxes confirming that you agree with the declaration and that you have uploaded the appropriate documents.



- 3. Click Save Draft.
- 4. Click **Submit**. A pop-up message similar to the one below will appear.



- 5. Click **OK** to submit your form.
- 6. The system will check the proposal to ensure your uploads are in the correct format and that all mandatory fields have been completed. If all is in order, a pop up message will appear confirming that you have successfully submitted your application pending organisation approval. You will also receive an automated email from donotreply@epa.ie confirming that your proposal has been successfully submitted pending organisational approval.
- 7. The content of your application is now locked. You can still view the application by going to the **Applications & Historic Grants** section on your Home Page and selecting the **Submitted Applications** tab.



Possible Error Messages

or message	What it means	What do I do?
The following issues must be resolved before the proposal can be submitted: The uploaded Project Description PDF cannot be less than 1 page or greater than 25 pages. NOTE: after uploading PDF files you must click 'Save Draft' prior to Submitting. Prevent this page from creating additional dialogs.	You have tried to upload the wrong file format or not respected the page limit	Click 'ok' and amend your upload
epa.smartsimpiedk.ie says: Please complete Part A-Declaration. Prevent this page from creating additional dialogs. OK	You have forgotten to tick the 'I agree' box in the declaration section	Click 'ok' and complete the declaration section
epa.smartsImplebk.ie says: The following issues must be resolved before the proposal can be submitted: Grant Aid requested (€250000) must be less than or equal to Total Cost (€150000). The Project Description document was not uploaded properly or the file is in a format other than PDF. NOTE: after uploading PDF files you must click 'Save Draft' prior to Submitting.	The total project cost requested is less than the total grant aid requested	Click 'ok' and amend to relevant fields.
epa.smartsimpledk.ie says: Demonstrate how proposal will deliver value for money: cannot be empty. Prevent this page from creating additional dialogs. OK	You did not complete a compulsory field	Click 'ok' and complete the relevant field.
lease correct the following errors and try again. Your organisation is still under "Pending Approval". In order to submit an application your organisation must be approved.	Your organisation has not yet been approved by the EPA	You cannot submit the application until you receive an email from donotreply@epa.ie notifying you that you organisation has been approved.

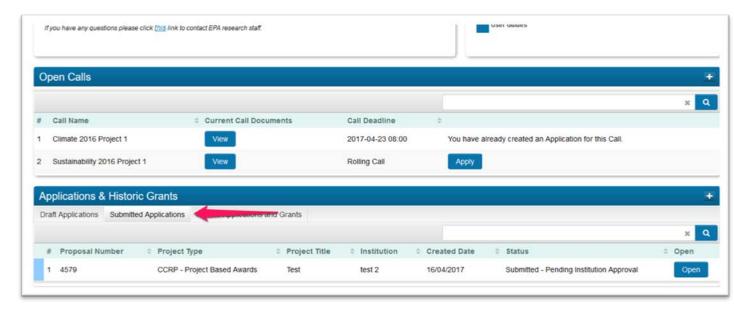
Please ensure that you do not leave it to the last minute to submit the application. The system automatically locks down at the deadline. Any proposal not submitted by the deadline is not a valid proposal and will not under any circumstances be deemed eligible by the EPA.

Authorisation process – three possible outcomes, and what to do in each case

- 1. Once submitted, the application goes to your organisation for authorisation.
- 2. The appropriate person in your organisation will be notified of the application submission by email.
- 3. The organisation has a limited time to review and authorise, as specified in the Call Technical Description document. If this deadline is missed, the application is not considered valid and is not sent for evaluation. It is the applicant's responsibility to ensure that organisational approval is received on time.
- 4. Within that limited time, the organisation has the opportunity to review the application. Following review, they have three options:
 - Option 1. Authorise the application;
 - Option 2. Decline the application;
 - Option 3. Request revisions.

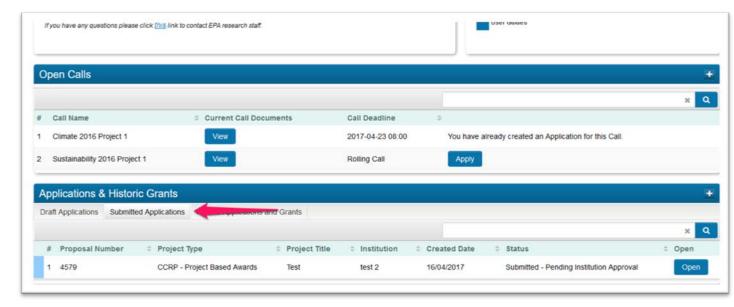
Under option 1:

- You will be notified (by automated email from donotreply@epa.ie) that the proposal has been authorised by your organisation.
- You need do nothing further the EPA will send the application for evaluation.
 You can view your proposal by going to the Applications & Historic Grants section and selecting the Submitted Applications



Under option 2:

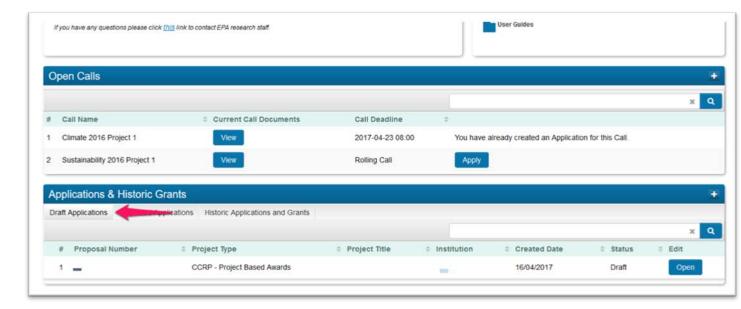
- You will be notified (by automated email from donotreply@epa.ie) that the proposal has not been authorised by your organization. The reason for this will be provided in the email
- You can also view the reason for this decision by viewing your proposal. You can do
 this by going to Submitted Applications tab under Applications & Historic Grants
 section on your Home page.



- The justification will be visible in the **Authorisation-part B** section on the application screen.
- Your application will not be sent for evaluation.
- In this case, we recommend that you discuss the matter with the relevant person in the organization. If the application was declined in error, please email research@epa.ie immediately and prior to the organisation approval deadline.

Under option 3:

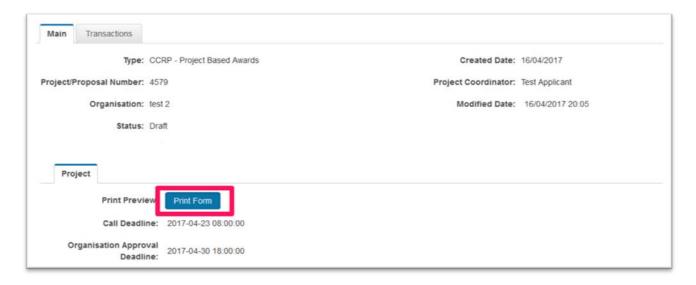
- You will be notified (by automated email from donotreply@epa.ie) that the proposal requires revision. Details of the required revisions will be contained in the email.



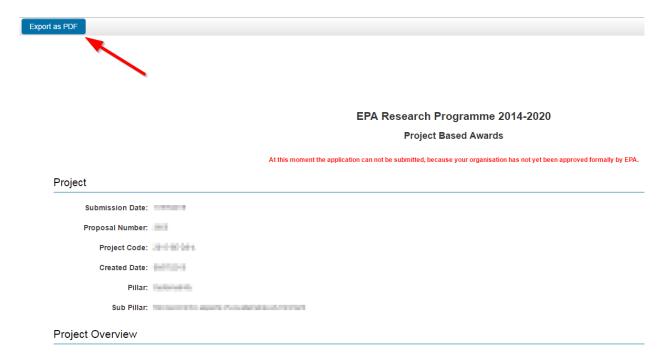
- The revisions requested by your organisation are in the Justification box in the Authorisation – part B section.
- Amend your form as required. Click Save Draft. Once you are satisfied, click Submit
- Your application will then go through the authorisation process again.
- Any revisions / subsequent re-authorisations must be made before the organisation approval deadline, or the application is invalid.

Printing your application

1. To print the application form, click the **Print Form** Button on the application form



- 2. This will open a web version of your application (with hyperlinks for all uploaded documents).
- 3. Turn this web view into a pdf document by clicking **Export as PDF** at the top of the web view.



4. The application can then be saved as pdf and/or printed.

The evaluation process

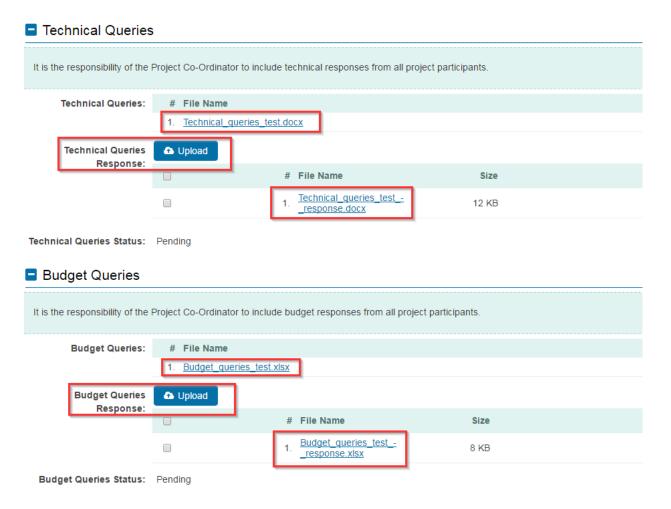
- 1. All valid, authorised submissions will be sent for evaluation.
- 2. For indicative timeframe, please see Call Technical Description.
- 3. You will be notified in writing of the outcome of this process.
- 4. Your application will not be visible to you during the evaluation process.

The negotiation process

- 1. If your proposal has been recommended for funding, you must use the portal to respond to any technical and financial queries raised during the evaluation process. You will have 14 days to respond to any technical and financial queries.
- 2. Login to the portal; go to **Submitted Applications** tab under **Applications & Historic Grants** section on your Home page.
- 3. Click on the **Evaluation-Negotiation** OPEN button



- 4. View the technical and budget queries by clicking the appropriate hyperlinks.
- 5. Prepare and upload responses to technical and budget queries.



6. Click Save Draft.

- 7. You do not have to upload financial and technical responses at the same time. However, the status will remain at **Draft** and the responses cannot be submitted until both technical and financial query responses have been uploaded.
- 8. Once you are happy with your responses, click **Submit**.
- 9. Your responses will be reviewed.
- 10. If further revisions are required, you will be notified by email via donotreply@epa.ie. Repeat steps 2-8 as required.
- 11. If no further revisions are required, you will be notified email from donotreply@epa.ie that the negotiation process has now been successfully completed. You must now contact the EPA with a proposed project start date and/or student details. On receipt of this information, the EPA will then proceed with the grant offer process.