GRANT REQUEST APPLICATION FORM (GRAF) USER INSTRUCTIONS

WAYPOINT RESEARCH INSTITUTE

NOV2023

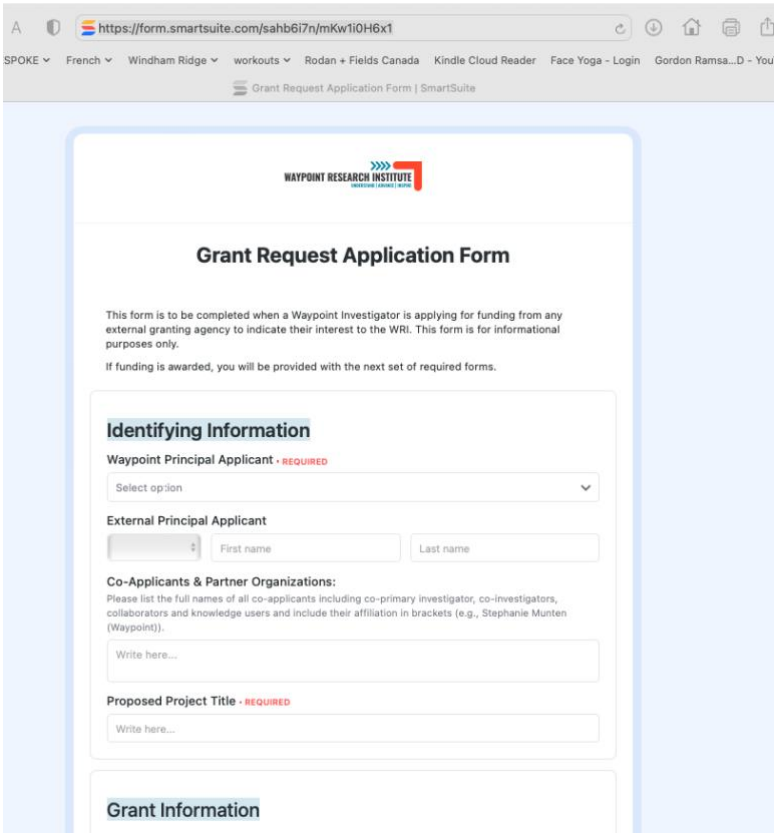
Table of Contents

Grant Request Application Form (GRAF) 2
Overview of GRAF Workflow 4
Step-by-Step Guide for Completing a GRAF 5
Filling an Application 5
Submitting the Form 6
Viewing the Status of your GRAF 6
GRAFs in Progress Dashboard Section 7
Responding to Questions/ Comments within SmartSuite 9
Grant Application Internal Review 10
Updating GRAF with the Decision Outcome 11
Awarded Grant Details Form 12
Submitting the Awarded Grant Details Form 13

Grant Request Application Form (GRAF)

This form can be found here: https://form.smartsuite.com/sahb6i7n/mKw1i0H6x1. To support external or internal GRAFs, this is a publicly available link (i.e., this link may be used by non-SmartSuite account holders).

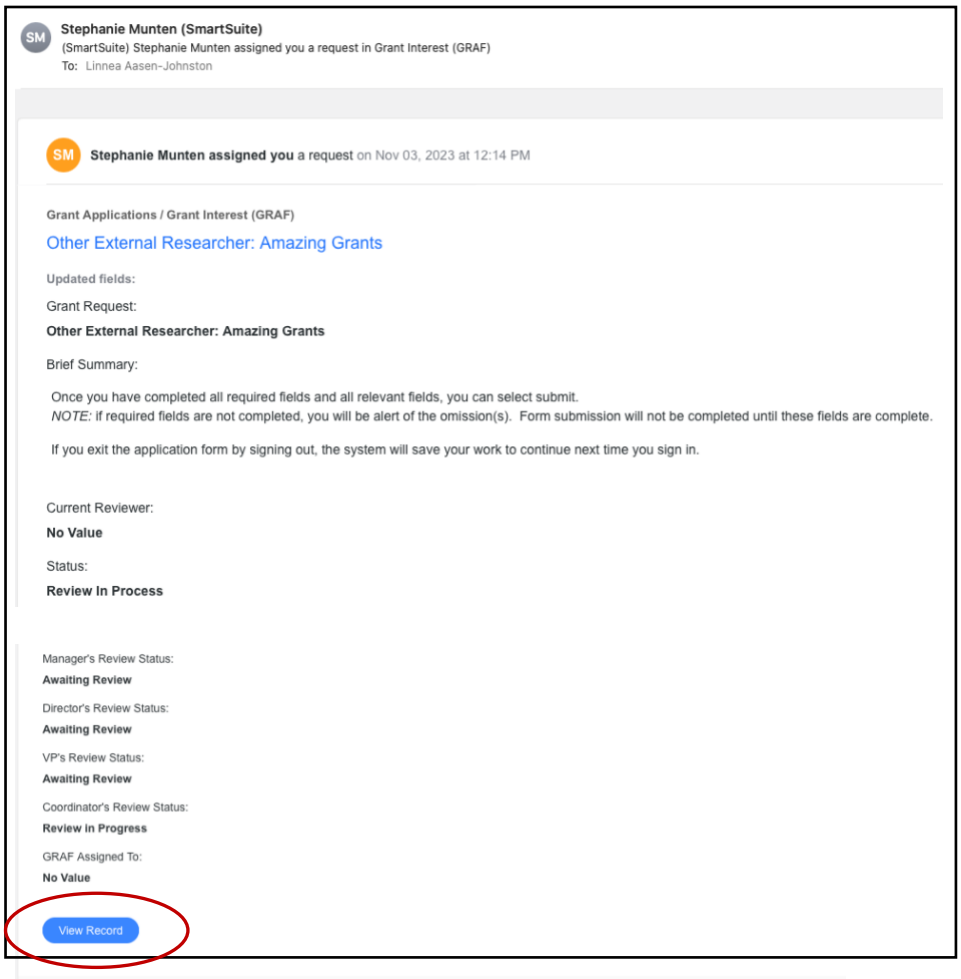
Once you select this link, the following form will open on a web browser:



Once the GRAF form is filled and submitted, the system will route the completed form to the appropriate approvers, based on your project details.

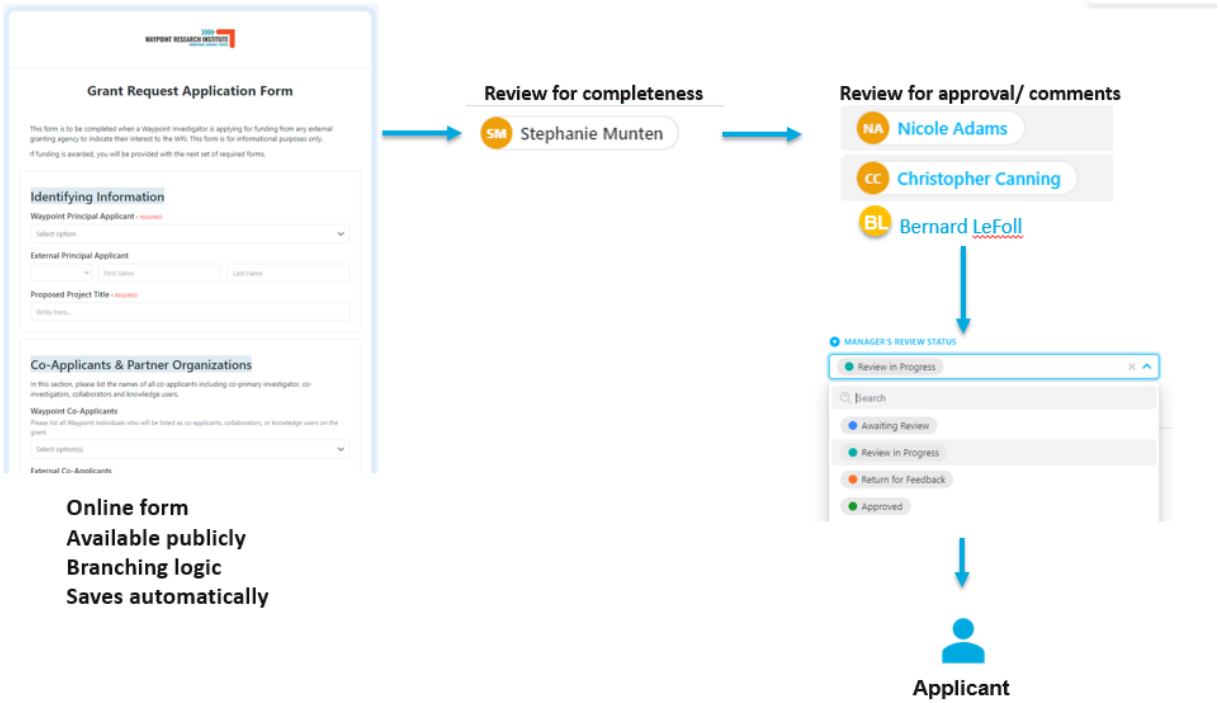
You will receive an email notifying you that the GRAF has been received. At the bottom of the email, you will find a "View Record" button. This will take you directly to your GRAF record in SmartSuite.

NOTE: You will need to sign-in to SmartSuite. If you are an external researcher, an account can be created by external users with the same email as used on the GRAF form.



See more information on the GRAF record here: GRAFs in Progress Dashboard Section.

Overview of GRAF Workflow

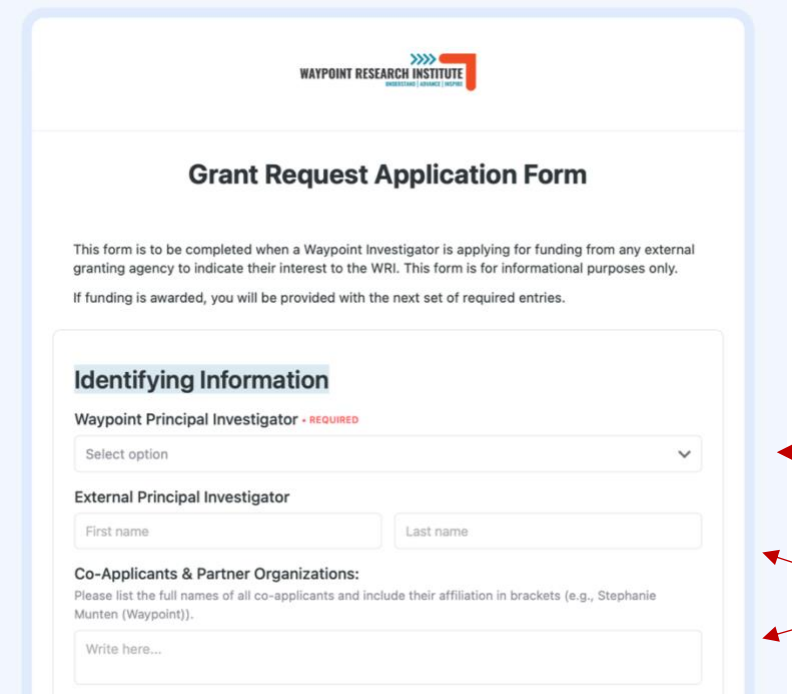


Step-by-Step Guide for Completing a GRAF

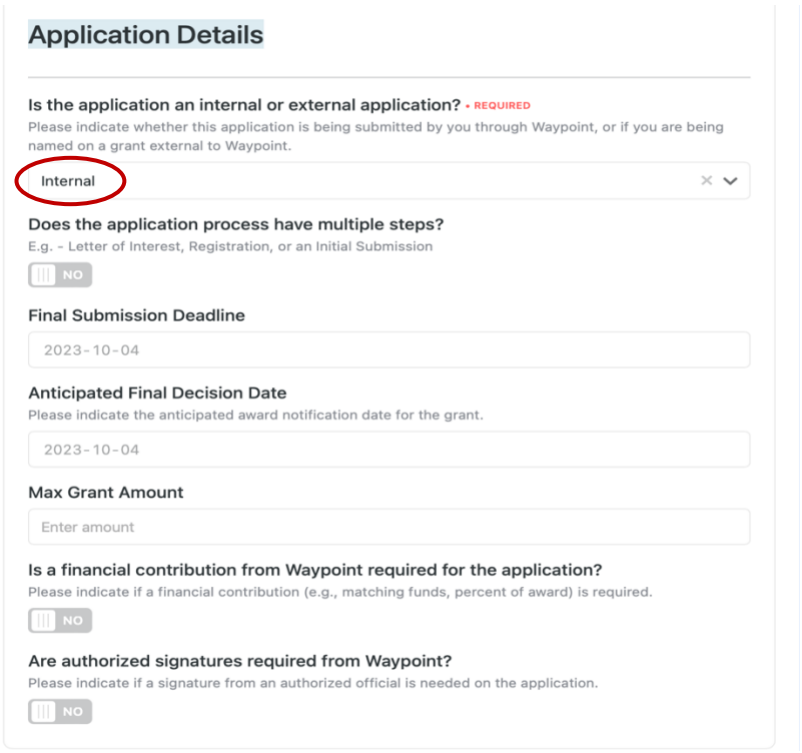
Filling an Application

The public GRAF link will take you directly to the GRAF online form.

Select from drop-down lists or enter text as indicated throughout the form.



The form contains branching logic, so based on your answers, different fields will be available to complete (e.g., when internal application is selected, more questions appear to complete).



Submitting the Form

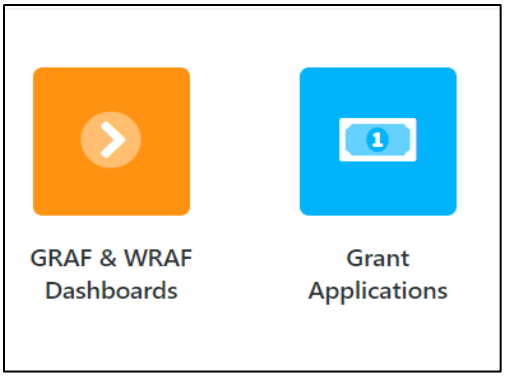
Once you have completed all the required and relevant fields, you can select "Submit". If you exit the GRAF form before it is complete and submitted, the system will save your work to continue next time you (the same applicant) open the GRAF form link.

NOTE*:* If required fields are not completed, you will be alerted of the omission(s). Form submission will not be completed until all required fields are complete.

Viewing the Status of your GRAF

You will have access to this record by logging into your SmartSuite account (https://smartsuite.com/) and selecting the *GRAF & WRAF Dashboards* solution or the *Grant Applications* Solution.

NOTE: The *GRAF & WRAF Dashboards* were created so you can easily view all information related to your grant application(s). The dashboards summarize information from all Tables in the *Grant Applications* solution. Only the Principal Researcher or assigned team member(s) will have access to the associated GRAF record.



Once you are in the *GRAF & WRAF Dashboards* or *Grant Applications* solution, you will have access to all GRAF records that you are associated with under each Table (seen as tabs across the top).

The GRAF related Table in *GRAF & WRAF Dashboards* solution is as follows:

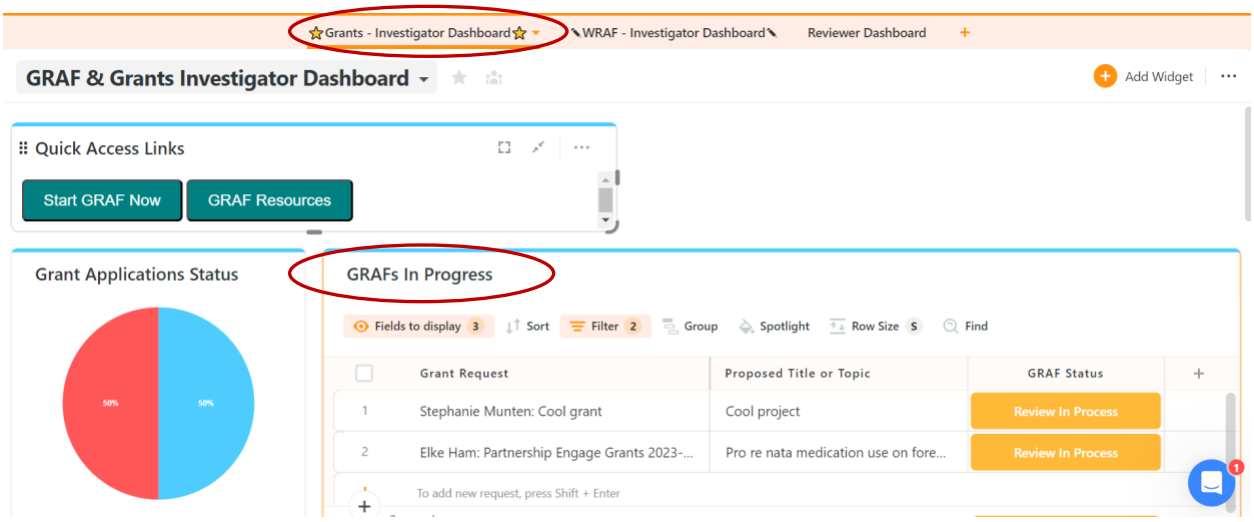
> *Grants – Investigator Dashboard*: this dashboard summarizes information from all Tables in the *Grant Applications* solution.

The Tables in the *Grant Applications* solution are as follows:

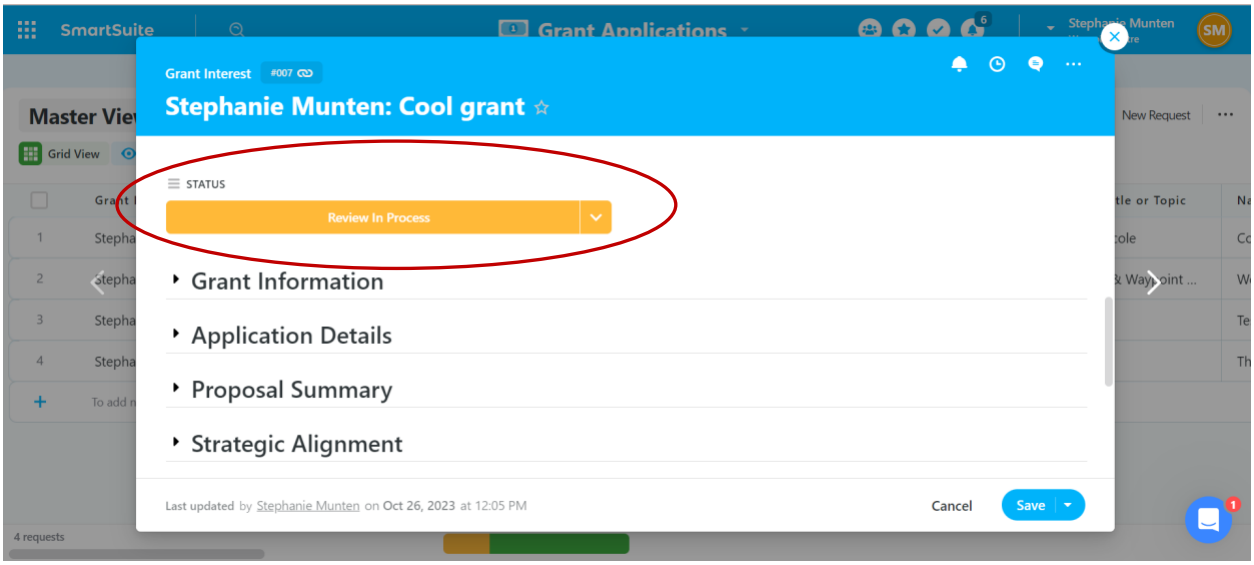
1) *Grant Interest (GRAF)* – This Table will show you all of the GRAFs you have submitted and their current status.
2) *Grant Internal Review* – This Table is where you will find the dates for internal review of your grant, and where you will upload additional grant materials for the reviewers upon request from the Research Coordinator.
3) *Award Details* – This Table will capture all of the details of your awarded grant (e.g., award amount and reporting timelines). You will update this information when you are notified of the grant decision from the granting agency.

GRAFs in Progress Dashboard Section

All of the GRAFs you currently have in progress will be shown in the *GRAFs in Progress* section of the dashboard.

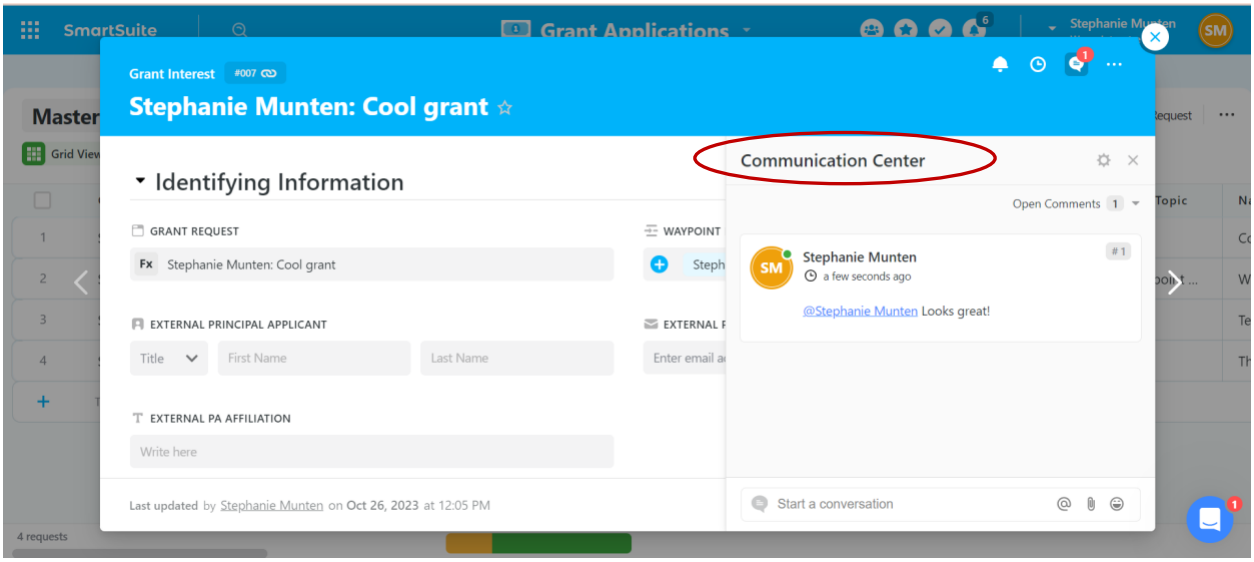


By double clicking a specific GRAF record, you can see all of the information you submitted via the GRAF form, and the status of that particular GRAF review.

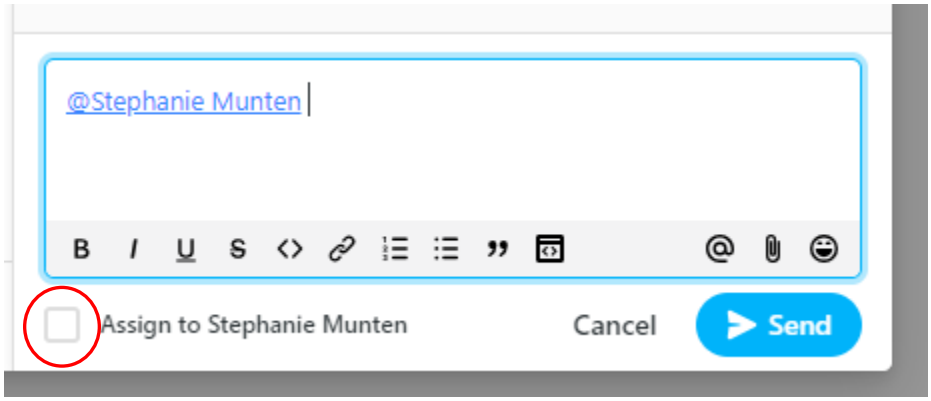


Responding to Questions/ Comments within SmartSuite

Reviewers assigned to a GRAF review can make comments or provide feedback in the *Communication Center* within the GRAF record. The *Communication Center* allows you to tag specific individuals as well, if they need to address specific comments being made:



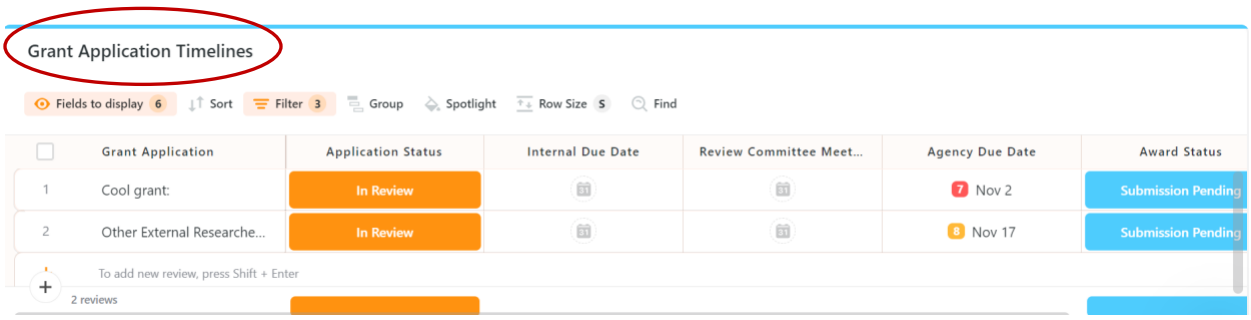
You can also assign a comment to a specific user by using the @ symbol in front of their name and selecting the "Assign to [name]" checkbox. This may be helpful when you are addressing comments and revisions within the GRAF record and collaborating with a team.



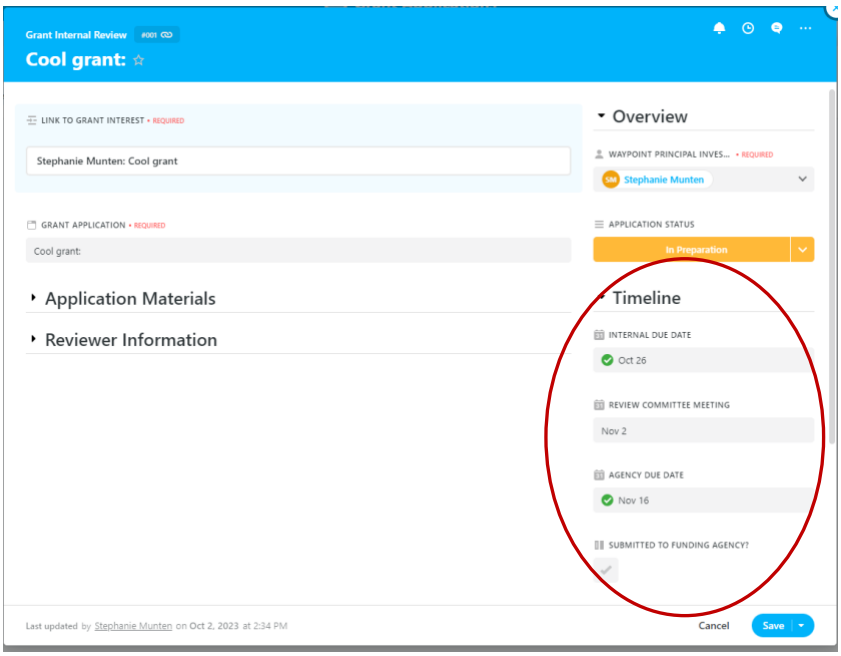
When you are mentioned in a comment, you will receive an email notification alerting you that specific communication for you is available.

Grant Application Internal Review

If your grant application is internal, or requires Waypoint resources beyond investigator time, your grant application will show in the *Grant Application Timelines* section of the dashboard. This will display the internal review due date as well as the committee meeting date.

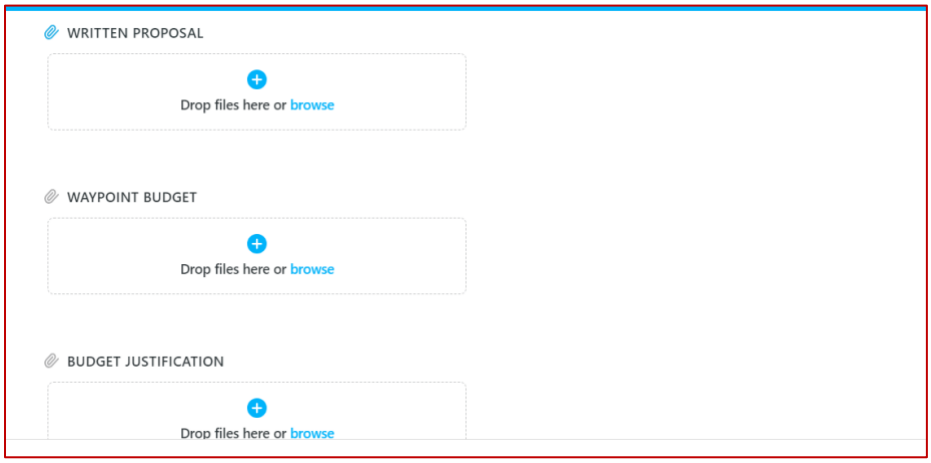


By double clicking a specific GRAF record, you can view all the details pertaining to the internal review of that particular GRAF record.



Within the GRAF record is also where you will be asked to submit additional grant application materials (e.g., written proposal, budget) and due dates for review (upon request from the Research Coordinator).

In place of submitting grant application materials for internal review to the Research Coordinator via email, we are utilizing SmartSuite as the central review portal. Prior to the Internal Due Date, you will be asked to upload completed grant application materials in the corresponding attachment fields (see examples below).



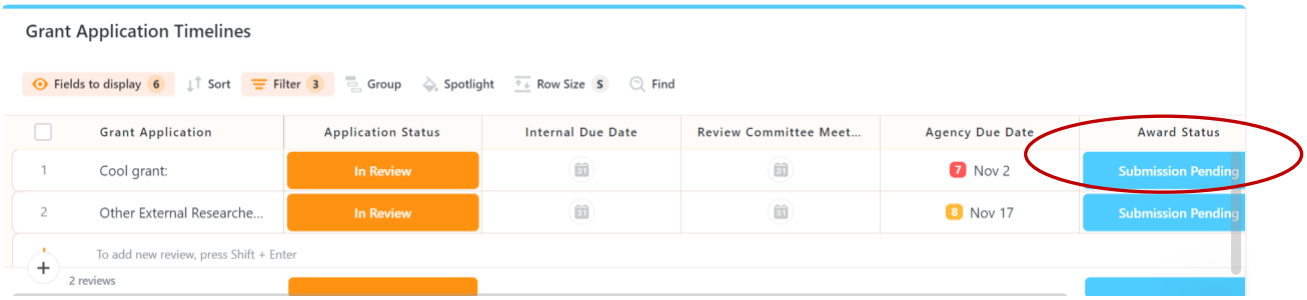
You will be sent an email one (1) week prior to the Internal Due Date reminding you of the deadline.

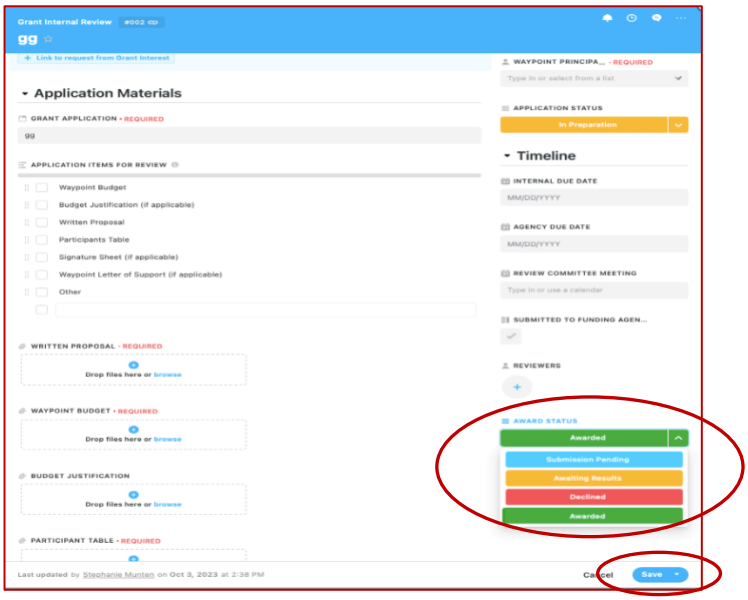
Once all materials are uploaded, Reviewers will be notified that there are grant application materials to review. Reviewers can provide feedback within the record, or they can bring their feedback to the Review Committee Meeting.

Updating GRAF with the Decision Outcome

Once the GRAF is approved and the grant decision (from the Granting Agency) is communicated, you will need to update the GRAF record with the final outcome.

You can do this by going into the GRAF record of interest and updating the *Award Status* field accordingly.



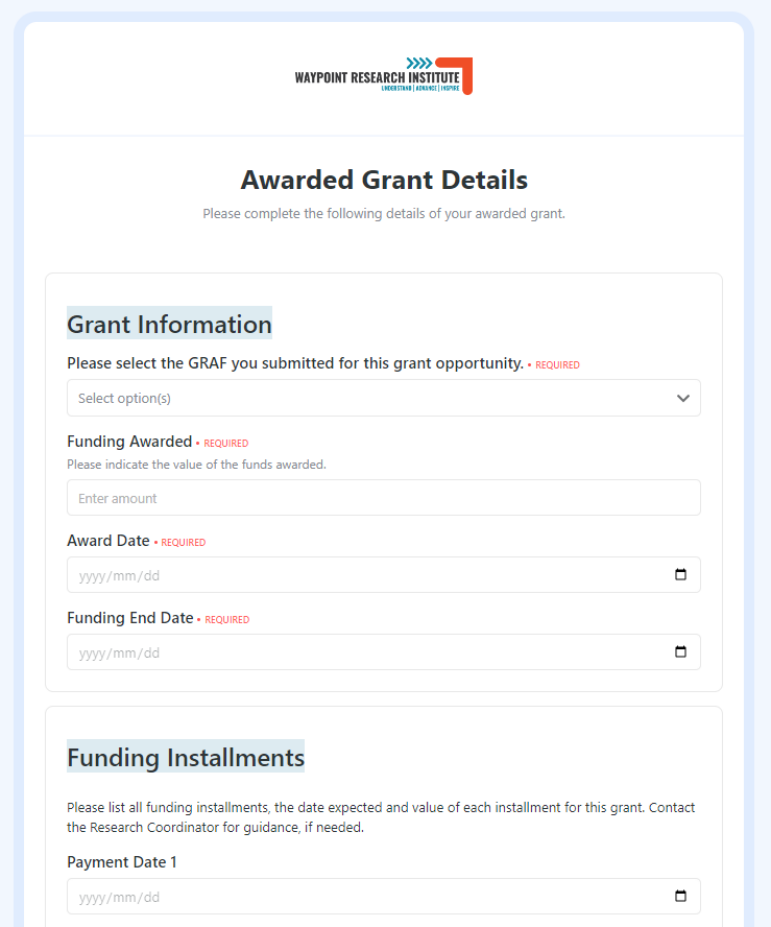


If the grant has been awarded, you will be sent a link to the final grant application form called *Awarded Grant Details* to collect specific award details.

Awarded Grant Details Form

This form can be found here: https://form.smartsuite.com/sahb6i7n/lfk3GXJbWS. This is a publicly available link.

Once you select this link, the following form will open on a web browser for you to complete:



Complete all relevant information, just like in the GRAF form.

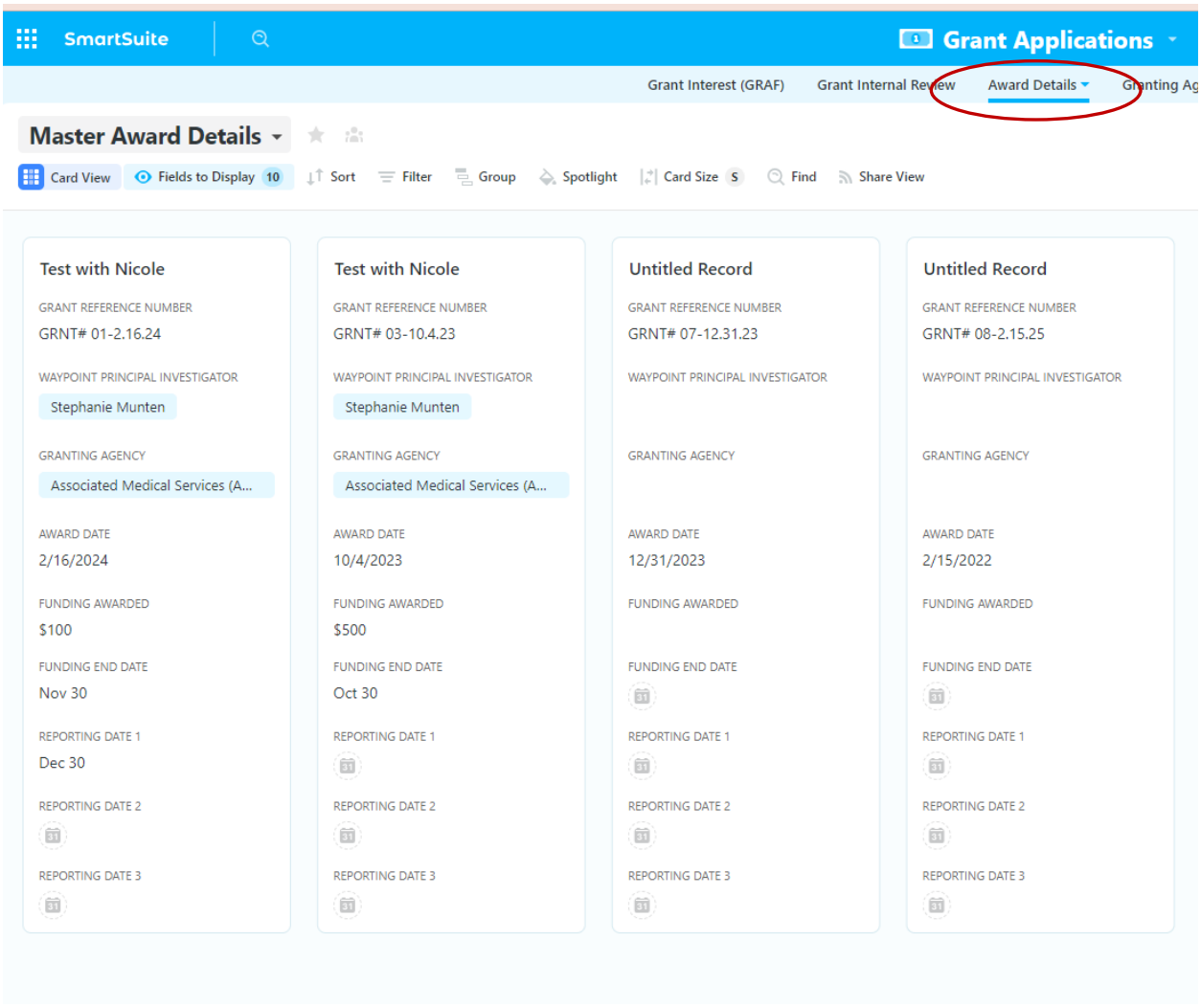
Submitting the Awarded Grant Details Form

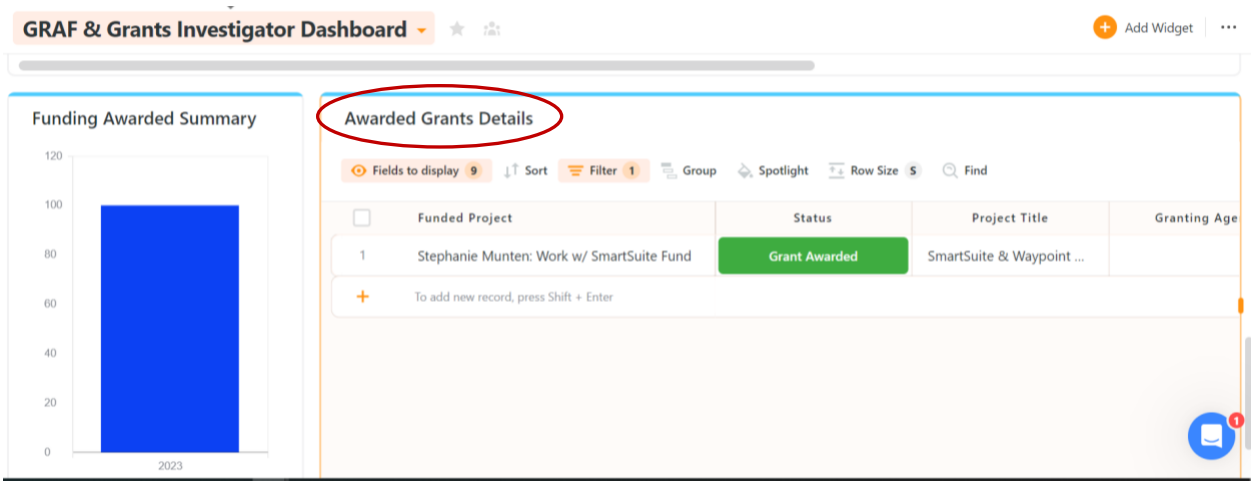
Once you have completed all the required and relevant fields, you can select “Submit”.

If you exit the *Awarded Grant Details* form before it is complete and submitted, the system will save your work to continue next time you open the *Awarded Grant Details* form link.

NOTE: If required fields are not completed, you will be alerted of the omission(s). Form submission will not be completed until all required fields are complete.

Once the *Awarded Grant Details* form has been submitted, you will be able to review all the information in the GRAF record created within the *Award Details* Table and within the Dashboard.


SmartSuite
Grant Applications
Grant Interest (GRAF)
Grant Internal Review
Award Details
Granting Ag
Master Award Details
Card View
Fields to Display 10
Sort
Filter
Group
Spotlight
Card Size S
Find
Share View
Test with Nicole
GRANT REFERENCE NUMBER
GRNT# 01-2.16.24
WAYPOINT PRINCIPAL INVESTIGATOR
Stephanie Munten
GRANTING AGENCY
Associated Medical Services (A...
AWARD DATE
2/16/2024
FUNDING AWARDED
$100
FUNDING END DATE
Nov 30
REPORTING DATE 1
Dec 30
REPORTING DATE 2
REPORTING DATE 3
Test with Nicole
GRANT REFERENCE NUMBER
GRNT# 03-10.4.23
WAYPOINT PRINCIPAL INVESTIGATOR
Stephanie Munten
GRANTING AGENCY
Associated Medical Services (A...
AWARD DATE
10/4/2023
FUNDING AWARDED
$500
FUNDING END DATE
Oct 30
REPORTING DATE 1
REPORTING DATE 2
REPORTING DATE 3
Untitled Record
GRANT REFERENCE NUMBER
GRNT# 07-12.31.23
WAYPOINT PRINCIPAL INVESTIGATOR
GRANTING AGENCY
AWARD DATE
12/31/2023
FUNDING AWARDED
FUNDING END DATE
REPORTING DATE 1
REPORTING DATE 2
REPORTING DATE 3
Untitled Record
GRANT REFERENCE NUMBER
GRNT# 08-2.15.25
WAYPOINT PRINCIPAL INVESTIGATOR
GRANTING AGENCY
AWARD DATE
2/15/2022
FUNDING AWARDED
FUNDING END DATE
REPORTING DATE 1
REPORTING DATE 2
REPORTING DATE 3


GRAF & Grants Investigator Dashboard
Add Widget
Funding Awarded Summary
120
100
80
60
40
20
0
2023
Awarded Grants Details
Fields to display 9
Sort
Filter 1
Group
Spotlight
Row Size S
Find
Funded Project
Status
Project Title
Granting Age
1
Stephanie Munten: Work w/ SmartSuite Fund
Grant Awarded
SmartSuite & Waypoint ...
To add new record, press Shift + Enter