

GRANT REQUEST APPLICATION FORM (GRAF) USER INSTRUCTIONS

WAYPOINT RESEARCH INSTITUTE
NOV2023

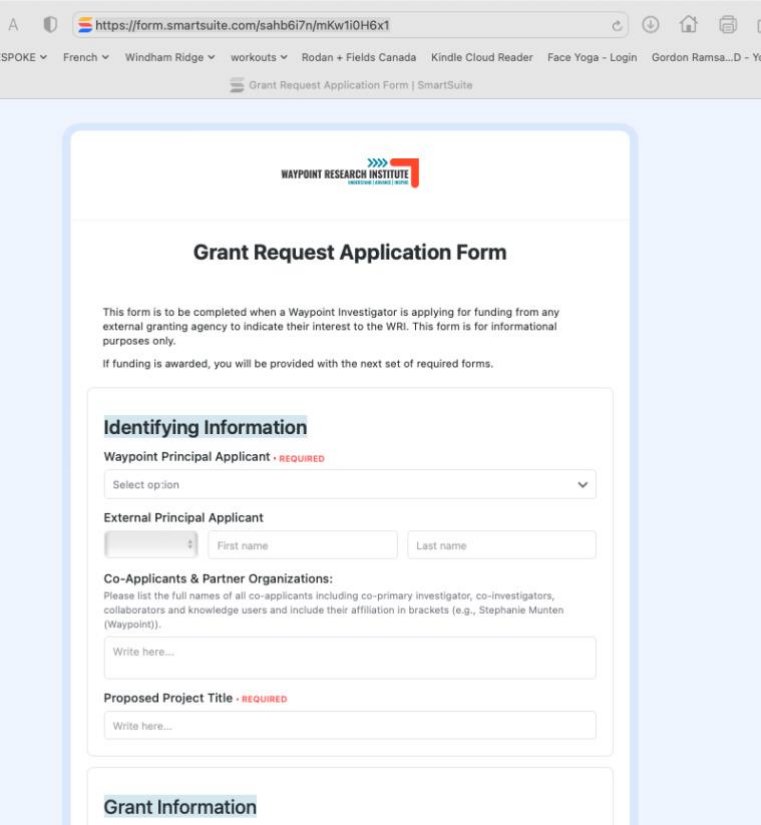
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Grant Request Application Form (GRAF)

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:



The screenshot shows a web browser window displaying the Grant Request Application Form (GRAF) for the Waypoint Research Institute. The browser's address bar shows the URL: <https://form.smartsuite.com/sahb6i7n/mKw1i0H6x1>. The browser's tab title is "Grant Request Application Form | SmartSuite".

The form itself has a light blue header with the Waypoint Research Institute logo and the title "Grant Request Application Form". Below the title, there is a paragraph of text: "This form is to be completed when a Waypoint Investigator is applying for funding from any external granting agency to indicate their interest to the WRI. This form is for informational purposes only. If funding is awarded, you will be provided with the next set of required forms."

The form is divided into sections. The first section is "Identifying Information". It contains a dropdown menu for "Waypoint Principal Applicant - REQUIRED" with the text "Select option" and a downward arrow. Below this is a section for "External Principal Applicant" with input fields for "First name" and "Last name".

The next section is "Co-Applicants & Partner Organizations:". It includes a sub-heading and a paragraph: "Please list the full names of all co-applicants including co-primary investigator, co-investigators, collaborators and knowledge users and include their affiliation in brackets (e.g., Stephanie Munten (Waypoint))." Below this is a text input field with the placeholder "Write here...".

The following section is "Proposed Project Title - REQUIRED" with a text input field and the placeholder "Write here...".

The final section visible is "Grant Information".

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.

SM **Stephanie Munten (SmartSuite)**
(SmartSuite) Stephanie Munten assigned you a request in Grant Interest (GRAF)
To: Linnea Aasen-Johnston

SM **Stephanie Munten assigned you a request** on Nov 03, 2023 at 12:14 PM

Grant Applications / Grant Interest (GRAF)
[Other External Researcher: Amazing Grants](#)

Updated fields:
Grant Request:
Other External Researcher: Amazing Grants

Brief Summary:
Once you have completed all required fields and all relevant fields, you can select submit.
NOTE: If required fields are not completed, you will be alert of the omission(s). Form submission will not be completed until these fields are complete.
If you exit the application form by signing out, the system will save your work to continue next time you sign in.

Current Reviewer:
No Value

Status:
Review In Progress

Manager's Review Status:
Awaiting Review

Director's Review Status:
Awaiting Review

VP's Review Status:
Awaiting Review

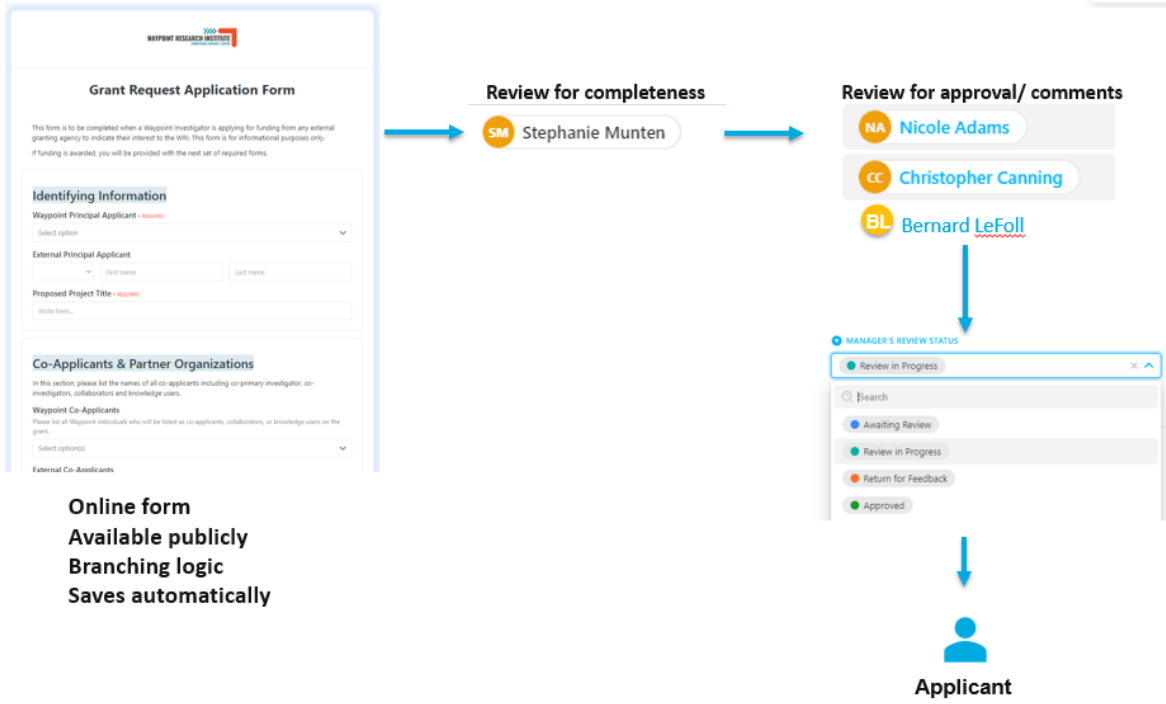
Coordinator's Review Status:
Review In Progress

GRAF Assigned To:
No Value

[View Record](#)

See more information on the GRAF record here: [GRAFs in Progress Dashboard Section](#).

Overview of GRAF Workflow

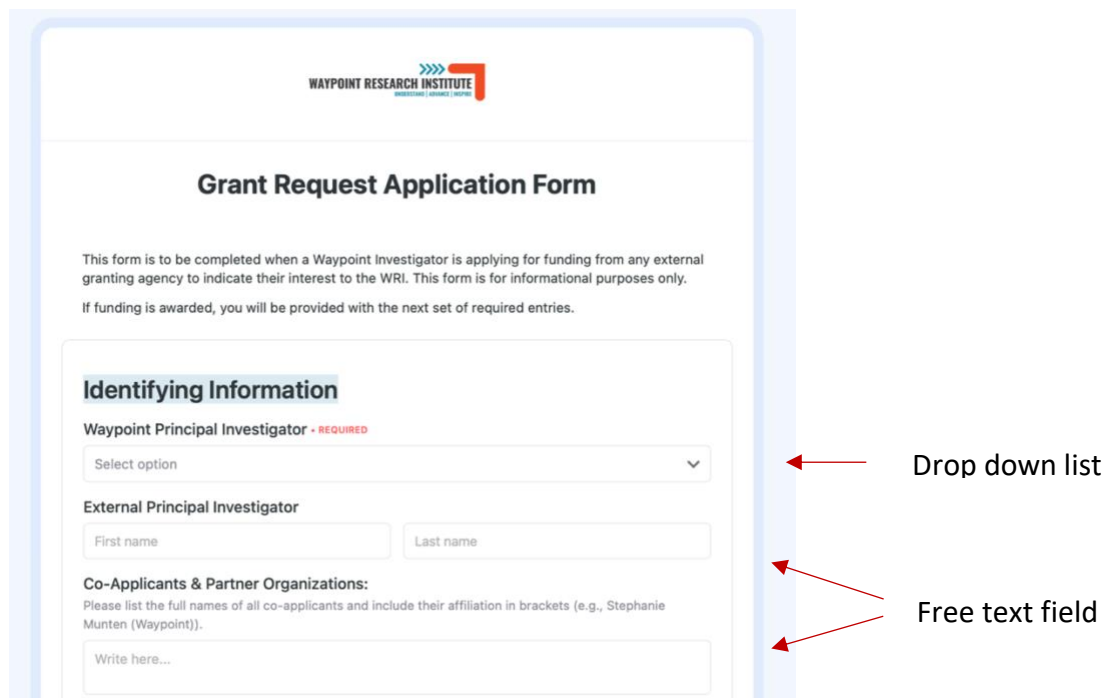


Step-by-Step Guide for Completing a GRAF

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 image shows a screenshot of the 'Grant Request Application Form' from the Waypoint Research Institute. The form is titled 'Grant Request Application Form' and includes a sub-section 'Identifying Information'. Within this section, there are three main input areas: a 'Waypoint Principal Investigator' field with a dropdown menu, an 'External Principal Investigator' section with 'First name' and 'Last name' text boxes, and a 'Co-Applicants & Partner Organizations' section with a 'Write here...' text area. Red arrows on the right side of the form point to the dropdown menu and the text area, with labels 'Drop down list' and 'Free text field' respectively.

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).

Application Details

Is the application an internal or external application? - REQUIRED
Please indicate whether this application is being submitted by you through Waypoint, or if you are being named on a grant external to Waypoint.

Internal

Does the application process have multiple steps?
E.g. - Letter of Interest, Registration, or an Initial Submission

NO

Final Submission Deadline

2023-10-04

Anticipated Final Decision Date
Please indicate the anticipated award notification date for the grant.

2023-10-04

Max Grant Amount

Enter amount

Is a financial contribution from Waypoint required for the application?
Please indicate if a financial contribution (e.g., matching funds, percent of award) is required.

NO

Are authorized signatures required from Waypoint?
Please indicate if a signature from an authorized official is needed on the application.

NO

Submitting the Form

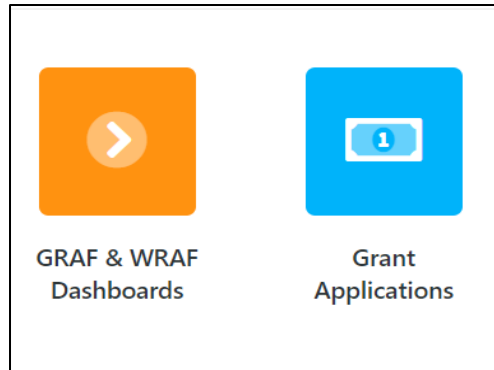
Once you have completed all the required and relevant fields, you can select “Submit”. If you exit the GRAF form before it is complete and submitted, the system will save your work to continue next time you (the same applicant) open the GRAF form link.

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:

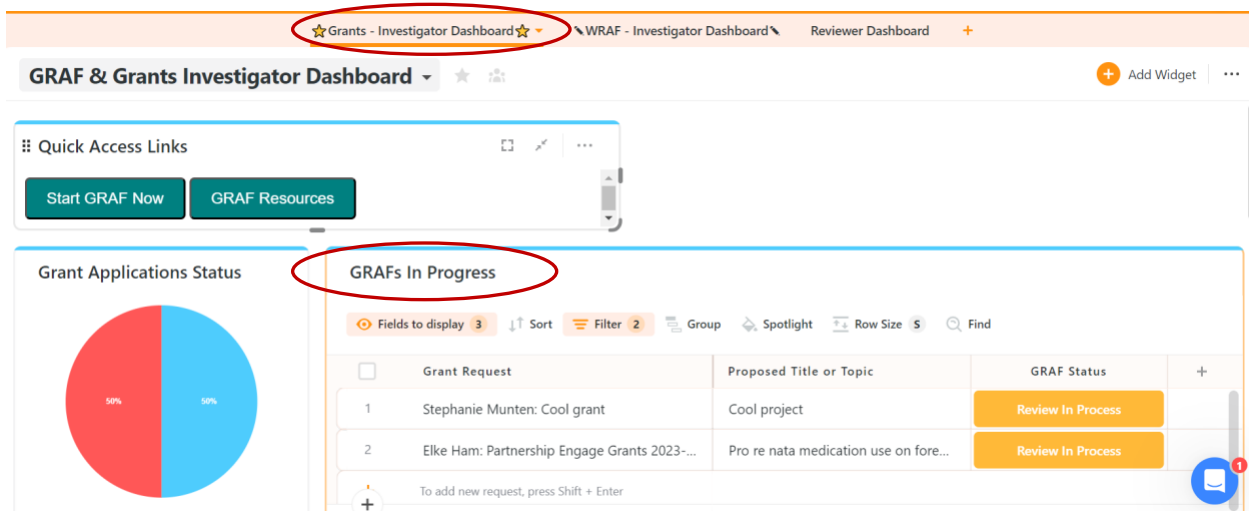
Grants – Investigator Dashboard: this dashboard summarizes information from all Tables in the *Grant Applications* solution.

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

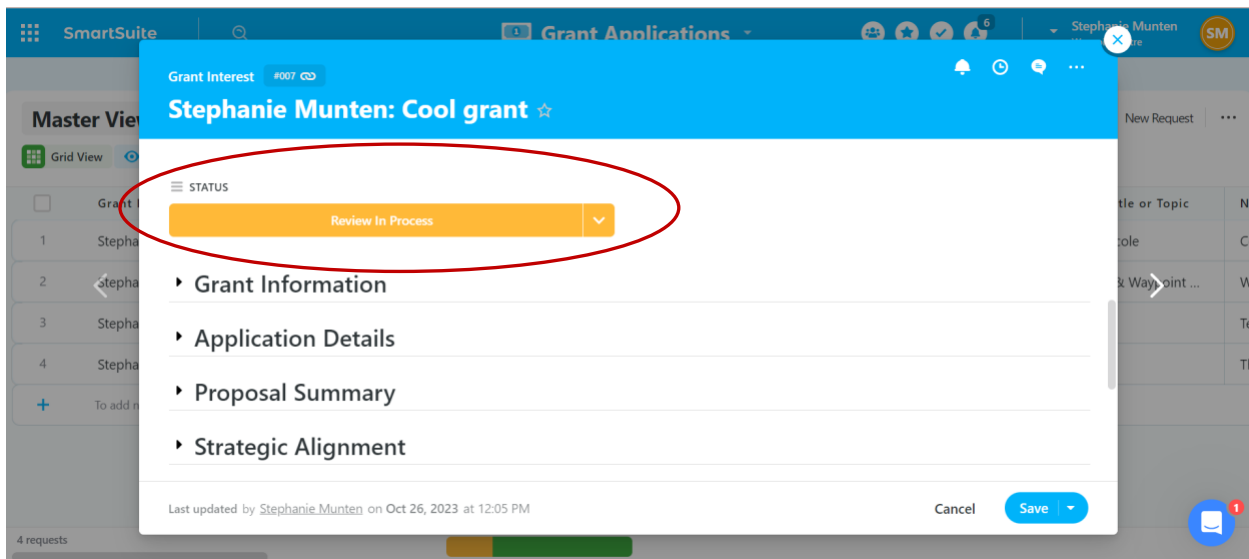
- 1) *Grant Interest (GRAF)* – This Table will show you all of the GRAFs you have submitted and their current status.
- 2) *Grant Internal Review* – This Table is where you will find the dates for internal review of your grant, and where you will upload additional grant materials for the reviewers upon 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.

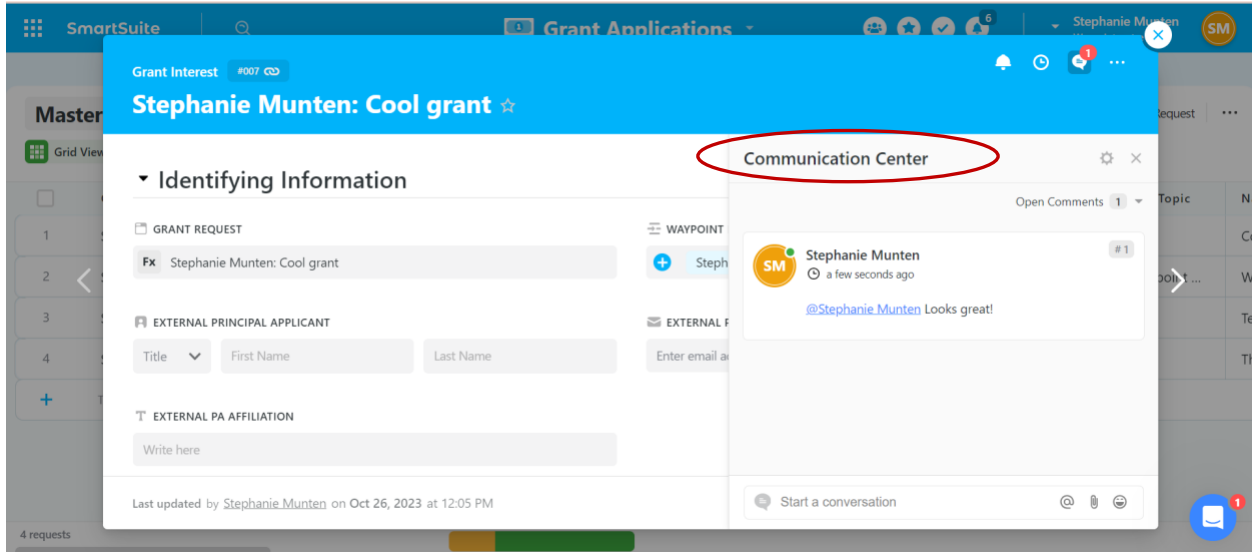


By double clicking a specific GRAF record, you can see all of the information you submitted via the GRAF form, and the status of that particular GRAF review.

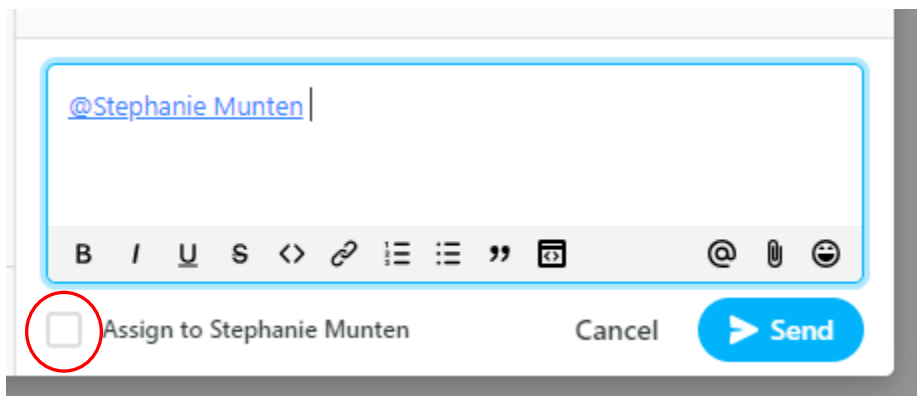


Responding to Questions/ Comments within SmartSuite

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.

Grant Application	Application Status	Internal Due Date	Review Committee Meet...	Agency Due Date	Award Status
1 Cool grant:	In Review			7 Nov 2	Submission Pending
2 Other External Researche...	In Review			8 Nov 17	Submission Pending

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

Grant Internal Review #001 CO

Cool grant: ☆

LINK TO GRANT INTEREST - REQUIRED
Stephanie Munten: Cool grant

GRANT APPLICATION - REQUIRED
Cool grant:

WAYPOINT PRINCIPAL INVES... - REQUIRED
Stephanie Munten

APPLICATION STATUS
In Preparation

Timeline

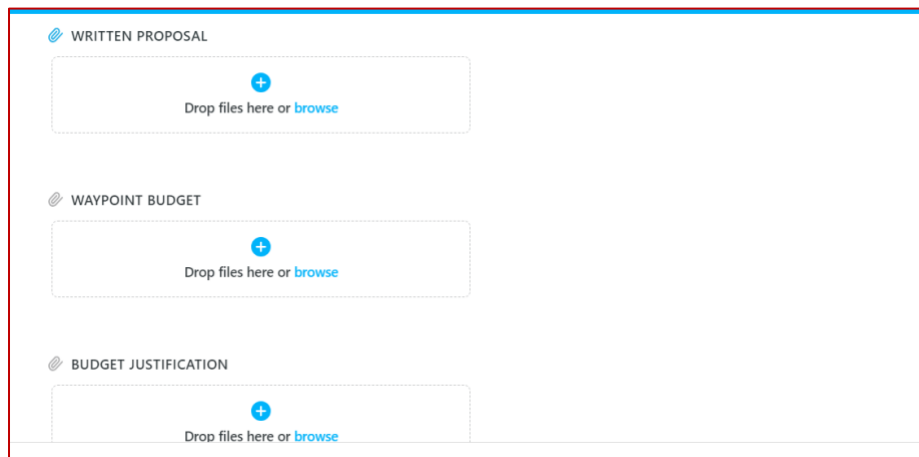
- INTERNAL DUE DATE
Oct 26
- REVIEW COMMITTEE MEETING
Nov 2
- AGENCY DUE DATE
Nov 16
- SUBMITTED TO FUNDING AGENCY?

Last updated by Stephanie Munten on Oct 2, 2023 at 2:34 PM

Cancel Save

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).



The image shows a screenshot of a web interface with three distinct sections for file uploads. Each section is titled with a document icon and a label: 'WRITTEN PROPOSAL', 'WAYPOINT BUDGET', and 'BUDGET JUSTIFICATION'. Below each title is a dashed-line rectangular box containing a blue plus sign in a circle and the text 'Drop files here or browse'. The entire interface is enclosed in a thin red border.

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.

Grant Application Timelines

Fields to display 6 | Sort | Filter 3 | Group | Spotlight | Row Size 5 | Find

Grant Application	Application Status	Internal Due Date	Review Committee Meet...	Agency Due Date	Award Status
1 Cool grant:	In Review			7 Nov 2	Submission Pending
2 Other External Researche...	In Review			8 Nov 17	Submission Pending

To add new review, press Shift + Enter

2 reviews

Grant Internal Review #002 03

Link to request from Grant Interest

WAYPOINT PRINCIPAL - REQUIRED

APPLICATION STATUS: In Preparation

Timeline

- INTERNAL DUE DATE: MMDDYYYY
- AGENCY DUE DATE: MMDDYYYY
- REVIEW COMMITTEE MEETING: Type in or use a calendar
- SUBMITTED TO FUNDING AGEN...:

AWARD STATUS

- Awarded
- Submission Pending
- Awaiting Results
- Declined
- Awarded

Save

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:

WAYPOINT RESEARCH INSTITUTE
LEADERSHIP | INNOVATION | INSPIRE

Awarded Grant Details

Please complete the following details of your awarded grant.

Grant Information

Please select the GRAF you submitted for this grant opportunity. • **REQUIRED**

Funding Awarded • **REQUIRED**
Please indicate the value of the funds awarded.

Award Date • **REQUIRED**

Funding End Date • **REQUIRED**

Funding Installments

Please list all funding installments, the date expected and value of each installment for this grant. Contact the Research Coordinator for guidance, if needed.

Payment Date 1

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
[Calendar Icon]

REPORTING DATE 3
[Calendar Icon]

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
[Calendar Icon]

REPORTING DATE 2
[Calendar Icon]

REPORTING DATE 3
[Calendar Icon]

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
[Calendar Icon]

REPORTING DATE 1
[Calendar Icon]

REPORTING DATE 2
[Calendar Icon]

REPORTING DATE 3
[Calendar Icon]

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
[Calendar Icon]

REPORTING DATE 1
[Calendar Icon]

REPORTING DATE 2
[Calendar Icon]

REPORTING DATE 3
[Calendar Icon]

GRAF & Grants Investigator Dashboard

+ Add Widget

Funding Awarded Summary

Year	Funding Awarded
2023	100

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			