

Note

Smile Train has recently migrated to a new online application and grant reporting system

In addition to receiving an invitation to complete an application, you should have also received and completed your Portal Registration invitation. If not, see the **Portal Registration Guide**, as you must complete this process to access the portal to complete your application.

Link to Smile Train Portal at <https://smiletrain.force.com/grantee/>

Accessing an Application Invitation

You will receive an email from Smile Train inviting you to complete an application through the portal. There are two email formats.

Scenario A: Email Link to Start a New Application

A1. You will receive an email that includes a link in the first paragraph to the application form you are being invited to complete.

Click the “here” link in the email.

Smile Train is pleased to invite your organization to submit a Smile Grant Application for consideration. You may access the application by logging into the portal via the link [here](#).

Please log into the Smile Train Grant Portal with this username and the password you previously created:

Username: sample.contact

If you have forgotten your password, you can reset it.

Thank you,

Smile Train Team

A2. You will receive an onscreen message asking if you would like to continue to the application.

Click Continue.

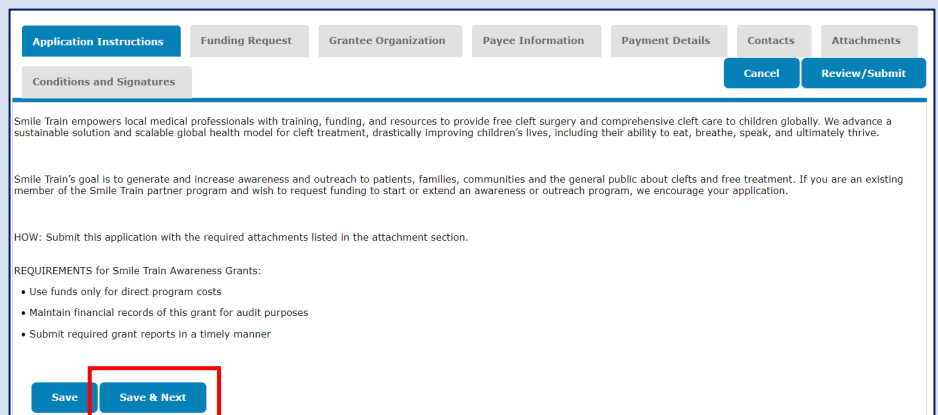
Do you want to continue to the application?

Cancel

Continue

A3. You will then be redirected to the application form. Each application type includes a custom set of questions, which are divided among the various tabs in the portal – the tabs you see may vary from those in the screenshot.

Click Save & Next to begin working on the application.



The screenshot shows a web application interface with a navigation bar at the top containing tabs: Application Instructions (highlighted), Funding Request, Grantee Organization, Payee Information, Payment Details, Contacts, and Attachments. Below the navigation bar are two buttons: Cancel and Review/Submit. The main content area contains a paragraph of text about Smile Train's mission, followed by a section titled 'HOW: Submit this application with the required attachments listed in the attachment section.' Below that is a section titled 'REQUIREMENTS for Smile Train Awareness Grants:' with a bulleted list: 'Use funds only for direct program costs', 'Maintain financial records of this grant for audit purposes', and 'Submit required grant reports in a timely manner'. At the bottom of the form are two buttons: Save and Save & Next (highlighted).

Note: You **MUST** click Save from this page to initiate application

Accessing an Application Invitation, continued

Scenario B: Complete an Application Started by Smile Train

B1. You will receive an email that includes a link in the first paragraph directing you to the Smile Train portal log in page.

Click the “here” link in the email.

B2. You will be redirected to the log in page. Enter your username and password that you previously created.

If you have forgotten your password, click “Can’t access your account?” to create a new password.

Or you can go directly to the Smile Train Portal at <https://smiletrain.force.com/grantee/>

B3. Once logged in, you will be on the Dashboard page of the portal. Navigate to the Requests section, using the left navigation box.

Select the application to be completed from the list by clicking the ▼ icon and “Edit” for that request.

B4. You will then be redirected to the application form. Each application type includes a custom set of questions, which are divided among the various tabs in the portal – the tabs you see may vary from those in the screenshot.

Click Save & Next to begin working on the application.

Smile Train is pleased to invite your organization to submit a Smile Grant Application for consideration. You may access the application by logging into the portal via the link [here](#).

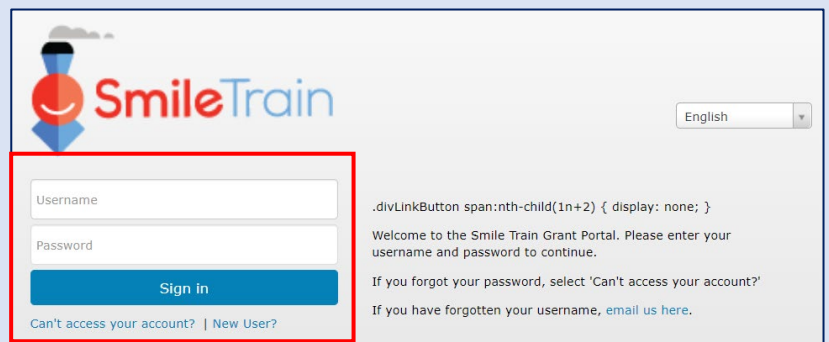
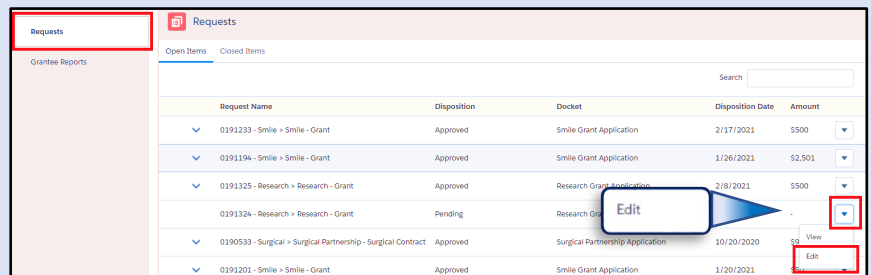
Please log into the Smile Train Grant Portal with this username and the password you previously created:

Username: sample.contact

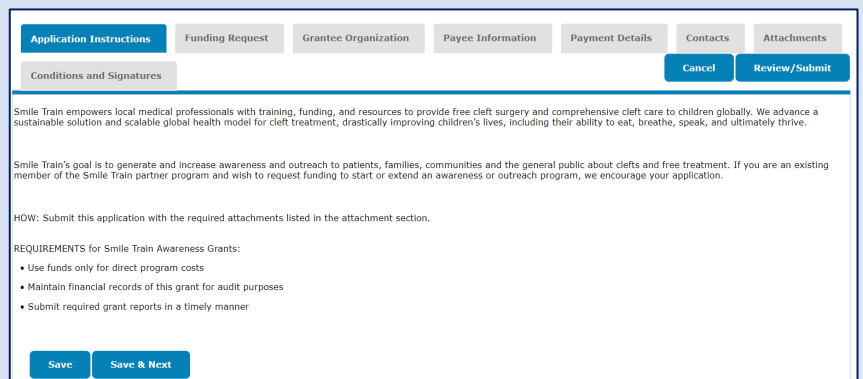
If you have forgotten your password, you can reset it.

Thank you,

Smile Train Team

Request Name	Disposition	Docket	Disposition Date	Amount
0191233 - Smile > Smile - Grant	Approved	Smile Grant Application	2/17/2021	\$500
0191194 - Smile > Smile - Grant	Approved	Smile Grant Application	1/26/2021	\$2,501
0191325 - Research > Research - Grant	Approved	Research Grant Application	2/8/2021	\$500
0191324 - Research > Research - Grant	Pending	Research Grant Application		
0190533 - Surgical > Surgical Partnership - Surgical Contract	Approved	Surgical Partnership Application	10/20/2020	
0191201 - Smile > Smile - Grant	Approved	Smile Grant Application	1/20/2021	



Application Instructions | Funding Request | Grantee Organization | Payee Information | Payment Details | Contacts | Attachments

Conditions and Signatures | Cancel | Review/Submit

Smile Train empowers local medical professionals with training, funding, and resources to provide free cleft surgery and comprehensive cleft care to children globally. We advance a sustainable solution and scalable global health model for cleft treatment, drastically improving children's lives, including their ability to eat, breathe, speak, and ultimately thrive.

Smile Train's goal is to generate and increase awareness and outreach to patients, families, communities and the general public about clefts and free treatment. If you are an existing member of the Smile Train partner program and wish to request funding to start or extend an awareness or outreach program, we encourage your application.

HOW: Submit this application with the required attachments listed in the attachment section.

REQUIREMENTS for Smile Train Awareness Grants:

- Use funds only for direct program costs
- Maintain financial records of this grant for audit purposes
- Submit required grant reports in a timely manner

Save | Save & Next

Note

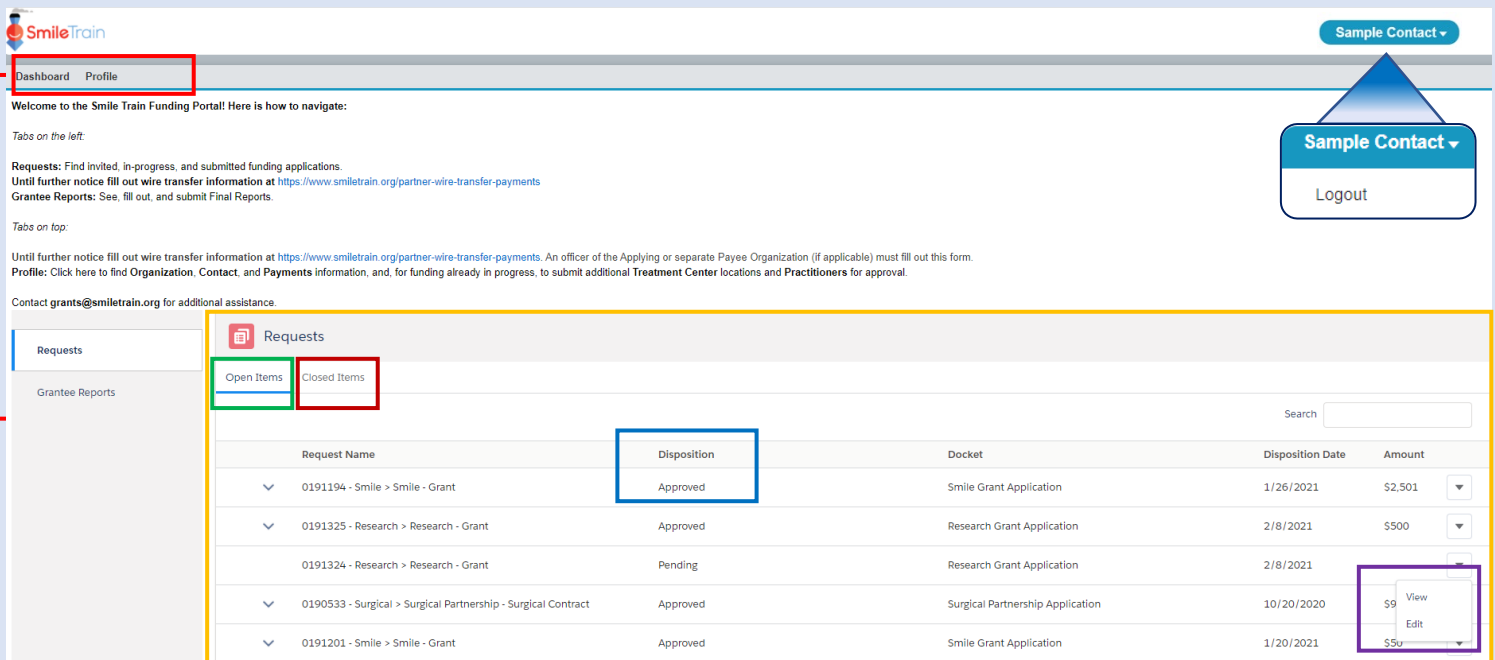
Each application form requests information specific to that application type. As the details of each application type vary, the remaining sections of this guide describe how to navigate sections and features common to most application types.

If you have questions about the content of an application or the information being requested, please contact grants@smiletrain.org. Questions about using the portal can be emailed to fcsupport@smiletrain.org.

Navigating the Smile Train Portal

Main Dashboard

The main dashboard in the portal is designed to allow you to easily access your applications, active grants and reporting requirements.



Welcome to the Smile Train Funding Portal! Here is how to navigate:

Tabs on the left:

Requests: Find invited, in-progress, and submitted funding applications.
 Until further notice fill out wire transfer information at <https://www.smiletrain.org/partner-wire-transfer-payments>
 Grantee Reports: See, fill out, and submit Final Reports.

Tabs on top:

Until further notice fill out wire transfer information at <https://www.smiletrain.org/partner-wire-transfer-payments>. An officer of the Applying or separate Payee Organization (if applicable) must fill out this form.
 Profile: Click here to find Organization, Contact, and Payments information, and, for funding already in progress, to submit additional Treatment Center locations and Practitioners for approval.

Contact grants@smiletrain.org for additional assistance.

Request Name	Disposition	Docket	Disposition Date	Amount
0191194 - Smile > Smile - Grant	Approved	Smile Grant Application	1/26/2021	\$2,501
0191325 - Research > Research - Grant	Approved	Research Grant Application	2/8/2021	\$500
0191324 - Research > Research - Grant	Pending	Research Grant Application	2/8/2021	
0190533 - Surgical > Surgical Partnership - Surgical Contract	Approved	Surgical Partnership Application	10/20/2020	\$9
0191201 - Smile > Smile - Grant	Approved	Smile Grant Application	1/20/2021	\$50

Top Navigation Bar

Grantee Dashboard can be used at any time to return to the main dashboard view.

Profile will allow you to view and update your organization and personal contact details as needed. *You may also add new Treatment Center and Practitioners under your profile.*

Requests

The **Open Items** tab is where you can locate all applications in process and active grants. The **Closed Items** tab will include previously awarded grants for which reporting requirements have been met and the end date has passed.

You can view the status of your request in the **Disposition** column. **Pending or Invited** applications will have both the **Edit and View** option available (click on the ▼ icon). Once an application has been submitted to Smile Train for review, or been approved, you will only be able to view the application details unless edits are requested.

Navigating Applications in the Smile Train Portal

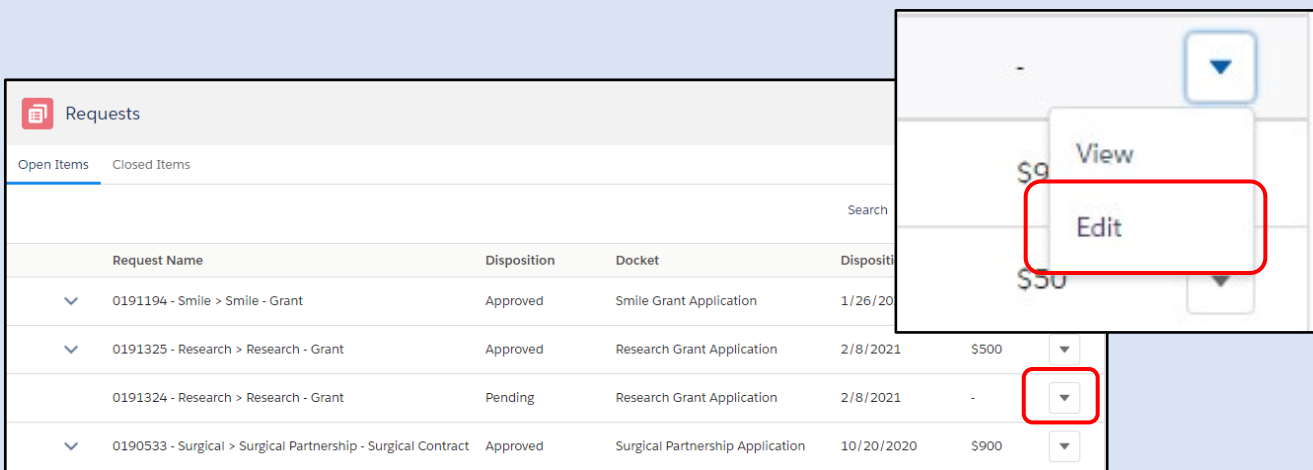
Note

Each application form requests information specific to that application type. As the details of each application type vary, the remaining sections of this guide describe how to navigate sections and features common to most application types.

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Accessing Applications

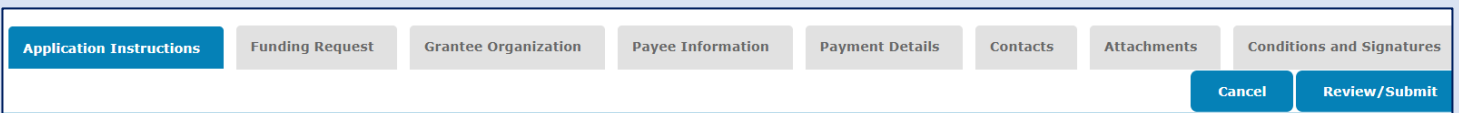
1. Click the ▼ icon for the application you would like to work on.
2. Then click "Edit." You will then be on the landing page for the application.



Request Name	Disposition	Docket	Disposition
0191194 - Smile > Smile - Grant	Approved	Smile Grant Application	1/26/20
0191325 - Research > Research - Grant	Approved	Research Grant Application	2/8/2021 \$500
0191324 - Research > Research - Grant	Pending	Research Grant Application	2/8/2021 -
0190533 - Surgical > Surgical Partnership - Surgical Contract	Approved	Surgical Partnership Application	10/20/2020 \$900

Application Elements

Each application will be organized via tabs, which include a set of questions related to the tab topic. You may click on each tab to move through the application as you work. Please note, the tabs will vary based on each application type.



Saving Your Work



The bottom left corner of each tab will have a Save and Save & Next button.

Save will allow you to save your work and continue your work on that tab.

Save & Next is required to save your work on the current tab and then move to the next tab to continue your work.

Working with Applications in the Smile Train Portal

Note

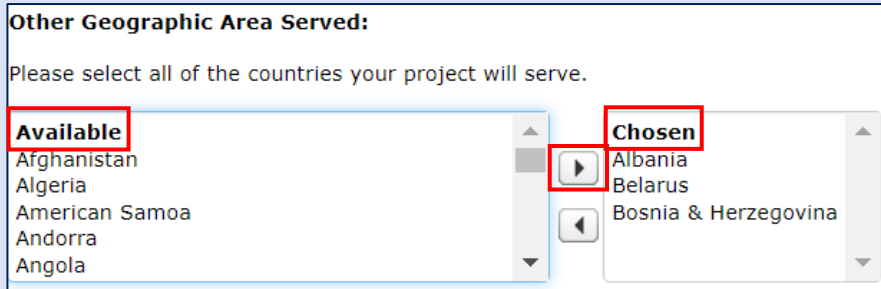
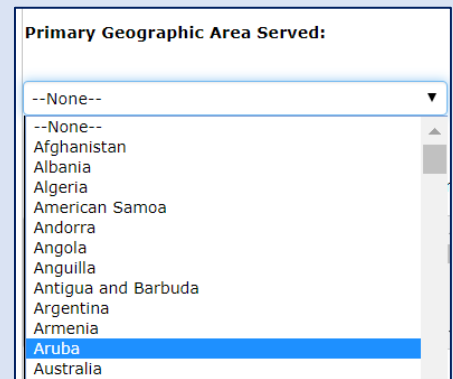
Each application form requests information specific to that application type. As the details of each application type vary, the remaining sections of this guide describe how to navigate sections and features common to most application types.

If you have questions about the content of an application or the information being requested, please contact grants@smiletrain.org. Questions about using the portal can be emailed to fcsupport@smiletrain.org.

Single and Multi-Select Fields

Single select fields will be indicated by a down arrow at the end of the field. Click into the field to expose the list of options.

Scroll through the list and click the desired entry.



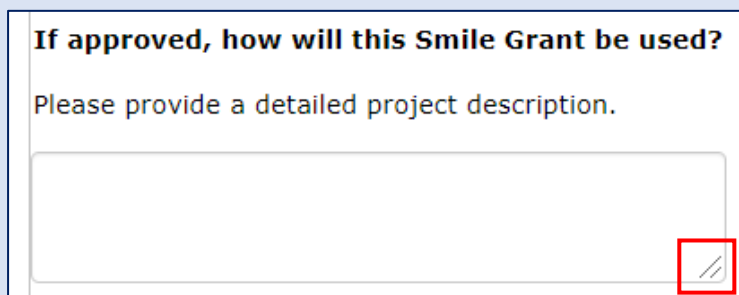
Multi-select fields will be indicated by an **Available** window on the left and **Chosen** window on the right.

Select one or more options in the **Available** pane. You can use **Ctrl+Click** to select multiple options. Use the **transfer arrow** to move your selections from the Available to Chosen pane.

Text Fields

Text fields will be indicated by a shading in the lower right corner of the field.

For longer responses, or those that require collaboration with your colleagues, you may draft text offline and copy and paste it into the application form. You can click and drag the shaded corner to expand the field size as needed.



0 of 32768 Characters

***Note:** If there is a character limit on the field, it will be noted to the far right of the question onscreen. The character count will adjust as you type or copy text into the field. **The field cannot be saved if you are over the limit.**

Key Application Items to be Completed

Note

Each application form requests information specific to that application type. As the details of each application type vary, the remaining sections of this guide describe how to navigate sections and features common to most application types..

If you have questions about the content of an application or the information being requested, please contact grants@smiletrain.org. Questions about using the portal can be emailed to fcsupport@smiletrain.org.

Funding Request

Please be sure to review and complete or update the following fields on this tab.

- **Currency**
- **Primary Geographic Area Served** – select the country where the majority of the work will be completed.
- **Other Geographic Area Served** – select one or more additional countries that will benefit from the work being completed.

- The confirmation note at the top of the page regarding **confirmation of the Grantee Organization name**. If edits are needed, please email grants@smiletrain.org.
- If you are a **return applicant**, and the Payee Organization name displayed below is not correct, you can submit new Payee Organization information with a new grant application or by contacting Smile Train directly at grants@smiletrain.org.
 - If contacting Smile Train, please provide the corrected Payee Organization name, along with the Grantee Organization name, your full name, and the email address under which you registered in the Smile Train grant portal.

Grantee Organization

- **Government Registration/Tax ID Number** - Please be sure to review and complete or update to reflect the current number on file with your country's registration bureau.
- **Primary and Other Geographic Area Served** – these selections should reflect the default areas where the organization does its work. It may vary from the information collected on the Funding Request tab, as that is specific to each grant application.
- **Payee Organization** – If you receive payments via a third-party organization, please review and confirm the information on file. If updates are needed, please complete the information on the Payee Information tab or email grants@smiletrain.org.

Key Application Items to be Completed, Continued

Contacts

On the **Contacts tab**, be sure to add all contacts related to the grant and key organization roles, including the following. See **Adding New Application Contacts** slide for detailed instructions.

- Primary contact for this grant application – review and edit as needed.
- Primary contact for the grantee organization.
- Primary contact for the payee organization, if using a separate payee organization.
- Key board members and key officers of the grantee organization, if not previously provided.
- Key board members and key officers of the payee organization, if using a separate payee, if not previously provided.

Attachments

On the **Attachments tab**, upload all required attachments listed for your application type. Click **Choose file** to browse your computer for the correct file to upload. **Select file, click Upload.**

Document Description -
Each document will include an overview of the information required within the file. Please be sure to review before uploading application attachments.

Detailed Budget
(In the currency you are requesting).
In the budget, please also indicate all other sources of income towards the project, actual and prospective, with amounts.

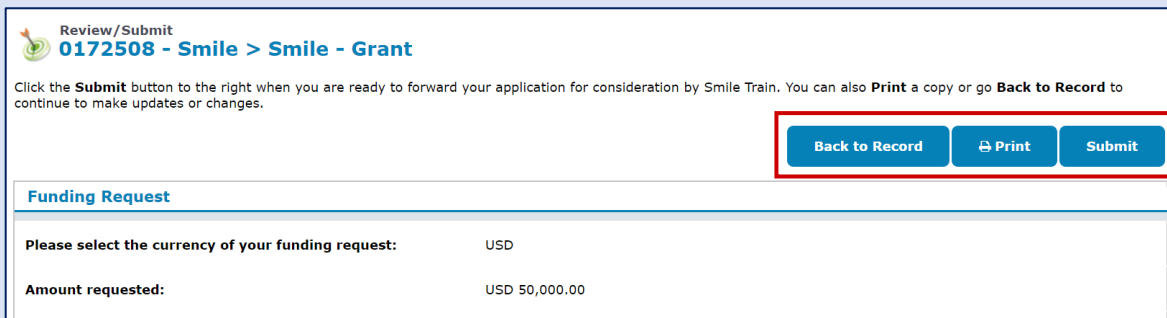
Attachment #	File Name	Attachment Description (Optional)	Created Date	Action
No Attachments				
<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Attachment Description (Optional) <div style="text-align: right; font-size: small;">0 of 1000 Characters</div> </div>				
<div style="display: flex; justify-content: center; gap: 10px;"> Choose file Upload </div>				
No file chosen				

Key Application Items to be Completed, Continued

Review/Submit

Once all of the application pages have been completed and all required attachments have been uploaded, click the **Review and Submit tab**. This will allow you an opportunity to preview your responses or **Print** a copy to review offline.

If you receive an error, scroll to review the error message. Then click **Back to Record** to update/complete the flagged required fields. You may also use the **Back to Record** option if you identify updates needed to the application during your review.



The screenshot shows a web interface for reviewing and submitting an application. At the top, it says "Review/Submit" and "0172508 - Smile > Smile - Grant". Below this, there is a instruction: "Click the **Submit** button to the right when you are ready to forward your application for consideration by Smile Train. You can also **Print** a copy or go **Back to Record** to continue to make updates or changes." To the right of this text are three buttons: "Back to Record", "Print", and "Submit". The "Print" button has a printer icon. Below the buttons is a section titled "Funding Request" with a table:

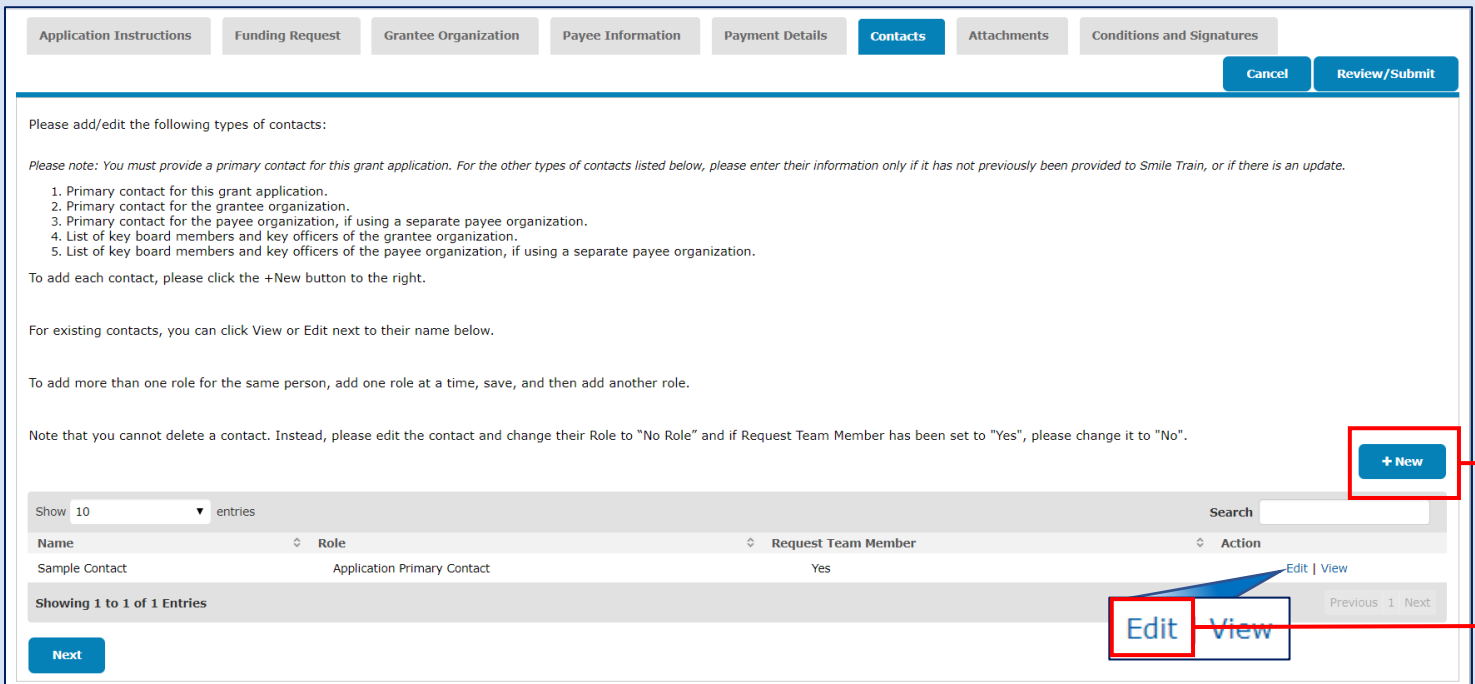
Funding Request	
Please select the currency of your funding request:	USD
Amount requested:	USD 50,000.00

Click **Submit** when you are ready to submit your application to Smile Train. Note, once you click Submit you will not be able to make additional edits to your application, unless it is returned by Smile Train.

Adding New Application Contacts

Your application should include up-to-date information for each of the following related contacts on your application.

- Primary contact for this grant application – review and edit as needed.
- Primary contact for the grantee organization, if different.
- Primary contact for the payee organization, if using a separate payee organization.
- Key board members and key officers of the grantee organization, if not previously provided.
- Key board members and key officers of the payee organization, if using a separate payee, if not previously provided.



Please add/edit the following types of contacts:

Please note: You must provide a primary contact for this grant application. For the other types of contacts listed below, please enter their information only if it has not previously been provided to Smile Train, or if there is an update.

1. Primary contact for this grant application.
2. Primary contact for the grantee organization.
3. Primary contact for the payee organization, if using a separate payee organization.
4. List of key board members and key officers of the grantee organization.
5. List of key board members and key officers of the payee organization, if using a separate payee organization.

To add each contact, please click the +New button to the right.

For existing contacts, you can click View or Edit next to their name below.

To add more than one role for the same person, add one role at a time, save, and then add another role.

Note that you cannot delete a contact. Instead, please edit the contact and change their Role to "No Role" and if Request Team Member has been set to "Yes", please change it to "No".

Show 10 entries

Name	Role	Request Team Member	Action
Sample Contact	Application Primary Contact	Yes	Edit View

Showing 1 to 1 of 1 Entries

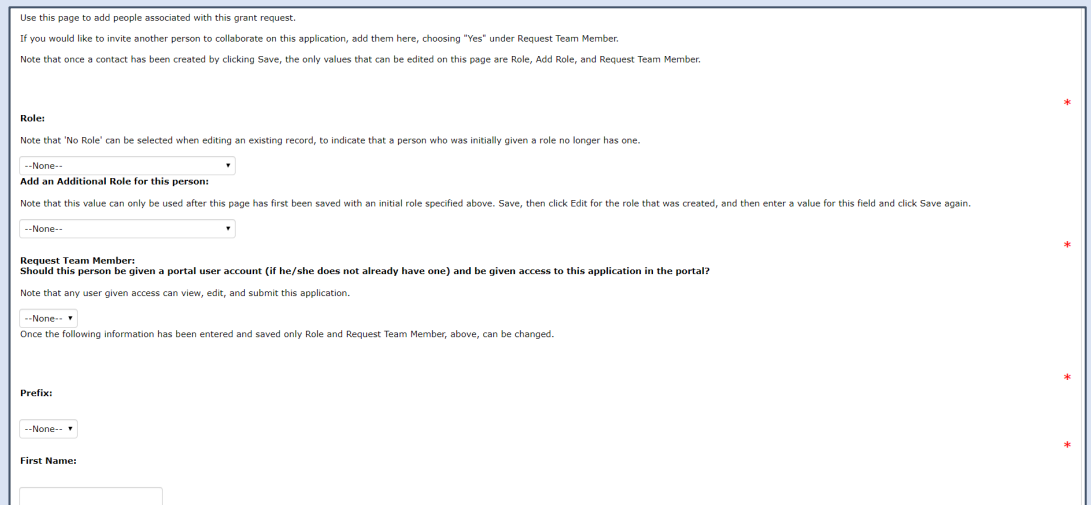
Next

To add new contacts, click **+New button**. To Edit existing contacts, click **Edit** aligned with the contact's name.

Add all **required (*)** contact information, **including their Role** within the organization.

Click Save

***Note:** Be sure to review all contact details carefully before saving the record. After saving, you will only be able to edit the contact's role(s) related to the grant request.



Use this page to add people associated with this grant request.

If you would like to invite another person to collaborate on this application, add them here, choosing "Yes" under Request Team Member.

Note that once a contact has been created by clicking Save, the only values that can be edited on this page are Role, Add Role, and Request Team Member.

Role:

Note that 'No Role' can be selected when editing an existing record, to indicate that a person who was initially given a role no longer has one.

--None--

Add an Additional Role for this person:

Note that this value can only be used after this page has first been saved with an initial role specified above. Save, then click Edit for the role that was created, and then enter a value for this field and click Save again.

--None--

Request Team Member:

Should this person be given a portal user account (if he/she does not already have one) and be given access to this application in the portal?

Note that any user given access can view, edit, and submit this application.

--None--

Once the following information has been entered and saved only Role and Request Team Member, above, can be changed.

Prefix:

--None--

First Name: