

Note

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

*In addition to receiving an email notification regarding your report coming due, 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 report.*

Accessing an Online Report Form

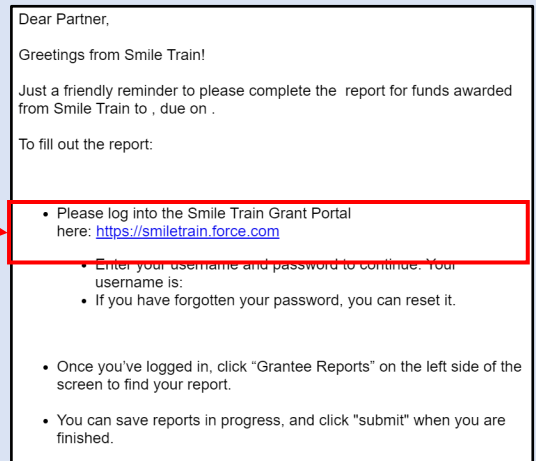
You will receive an email from Smile Train inviting you to complete your report via the portal. There are two ways to access, complete and submit the report that is due.

Scenario A: Access Report via Reminder Email

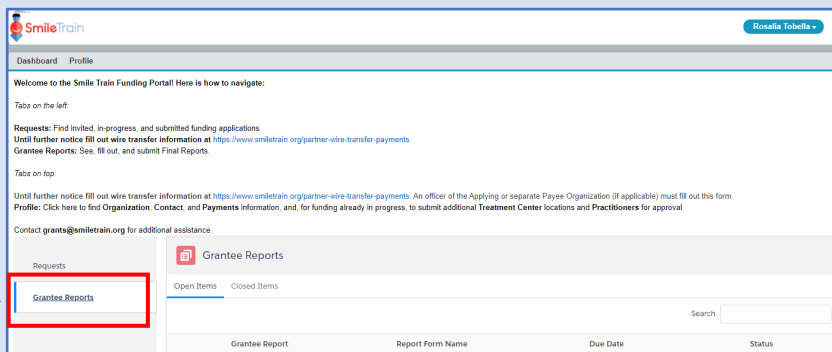
A1. You will receive a **report reminder email that includes a link to the Portal** when you can access the report form that is due for your organization.

Click the link in the email to access the Smile Train Portal.

A2. You will be directed to the **Portal Dashboard** where you can access, complete and submit the required report.



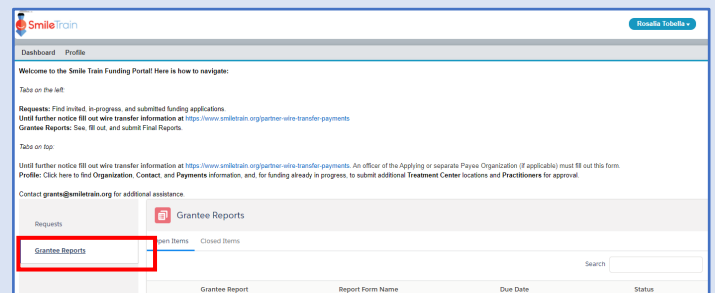
Click **Grantee Reports** on left navigation menu.



Scenario B: Access Report Form via Portal

B1. You may also access your report at anytime after your organization's grant has been approved by logging directly into the Smile Train Portal at <https://smiletrain.force.com/grantee/>

B2. Click **Grantee Reports** on left navigation menu



Navigating the Smile Train Portal

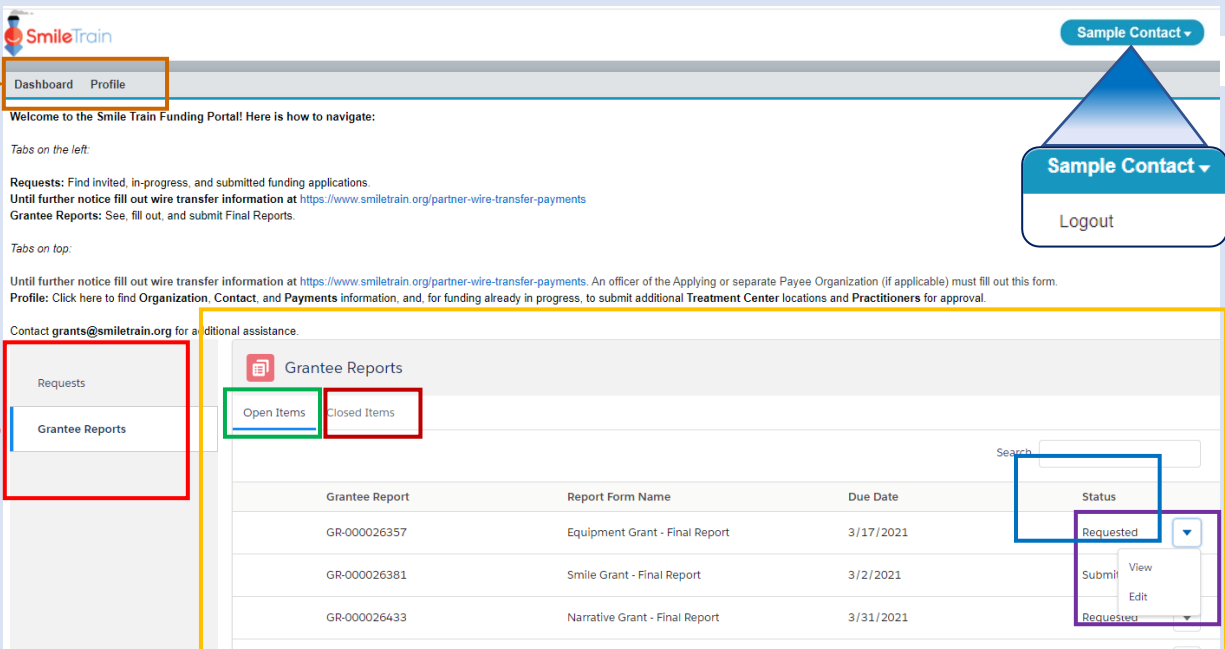
Main Dashboard

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

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 details as needed. *You may also add new Treatment Center and Practitioners under your profile.*



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.

Grantee Report	Report Form Name	Due Date	Status
GR-000026357	Equipment Grant - Final Report	3/17/2021	Requested
GR-000026381	Smile Grant - Final Report	3/2/2021	Submitted
GR-000026433	Narrative Grant - Final Report	3/31/2021	Requested

Left Navigation Bar

Requests can be used at any time to return to the list of Open and Closed Requests. Open requests are related to reports due.

Grantee Reports can be used at any time to return to the list of Open and Closed reports related to approved grants.

Reports

The **Open Items** tab is where you can locate all open reports in process and previously submitted that have not yet been approved. The **Closed Items** tab will include previously submitted reports that have been reviewed, approved and the grant request is closed.

You can view the status of your report in the **Status** column. Open **Requested Reports** will have the **Edit and View** option available (click on the ▼ icon). Once a report has been submitted to Smile Train for review, or been approved, you will only be able to view the report details unless edits are requested.

Working with Reports in the Smile Train Portal

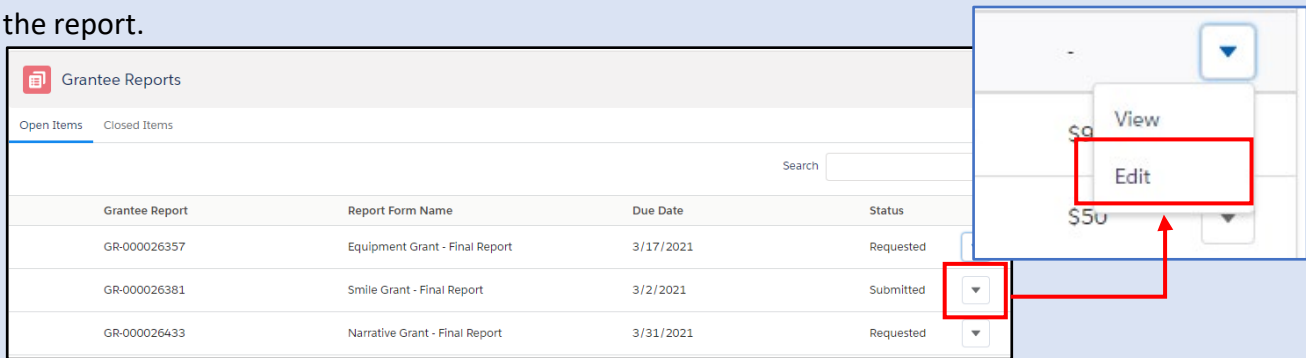
Note

Each report form has been customized to collect the information we need for that specific area of funding. As such the details of each report and the related tabs may vary.

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.

Accessing Reports

Click the ▼ icon, then “Edit,” for the report you would like to work on. You will then be on the landing page for the report.



Grantee Reports				
Open Items		Closed Items		
Grantee Report	Report Form Name	Due Date	Status	
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GR-000026433	Narrative Grant - Final Report	3/31/2021	Requested	

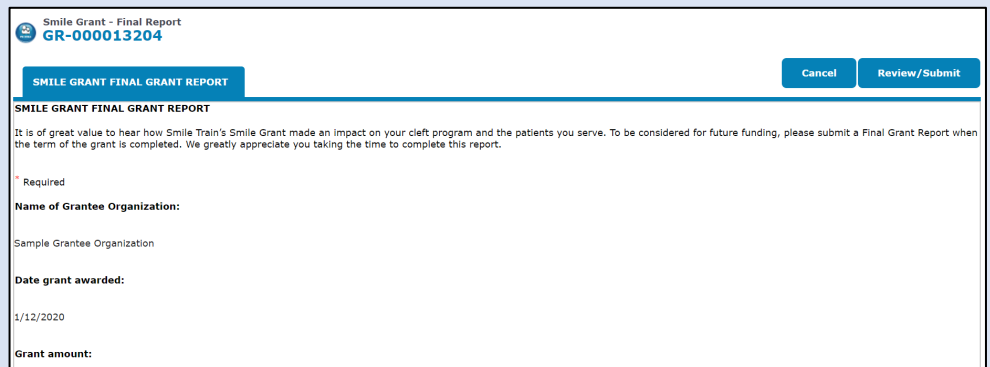
The callout shows a dropdown menu with 'View' and 'Edit' options. A red box highlights the 'Edit' button, and a red arrow points from the dropdown icon in the 'Submitted' status column of the table to this callout.

Report Elements

Be sure to complete each field in the report form.

Information required is based on the type of grant your organization received from Smile Train and the corresponding report for that program.

Click **Save**.



Smile Grant - Final Report
GR-000013204

SMILE GRANT FINAL GRANT REPORT

It is of great value to hear how Smile Train's Smile Grant made an impact on your cleft program and the patients you serve. To be considered for future funding, please submit a Final Grant Report when the term of the grant is completed. We greatly appreciate you taking the time to complete this report.

Name of Grantee Organization:
Sample Grantee Organization

Date grant awarded:
1/12/2020

Grant amount:

Buttons: Cancel, Review/Submit

Working with Reports in the Smile Train Portal, continued

Text Fields

Text fields will be indicated by 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.

Please provide detailed information about how the grant funds were used. *

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 Report Items to be Completed

Attachments

In the **Attachments section** (bottom of the report form), upload all required attachments outlined for your report 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				
Attachment Description (Optional)				
0 of 1000 Characters				

Choose file
Upload

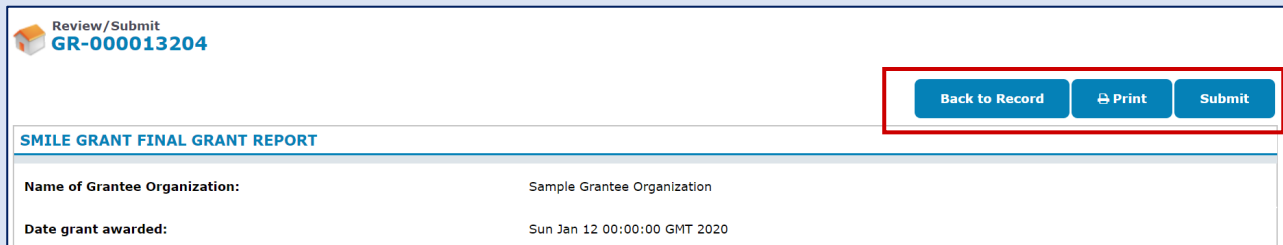
No file chosen

Key Report Items to be Completed, continued

Review/Submit

Once all of the report information has 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 messages. 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 are needed to the application during your review.



The screenshot shows a web interface for reviewing and submitting a grant report. At the top left, it says "Review/Submit" and "GR-000013204". On the right side, there are three buttons: "Back to Record", "Print", and "Submit". Below this is a section titled "SMILE GRANT FINAL GRANT REPORT". Underneath, there are two rows of information: "Name of Grantee Organization: Sample Grantee Organization" and "Date grant awarded: Sun Jan 12 00:00:00 GMT 2020".

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