

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.

Dear Partner,

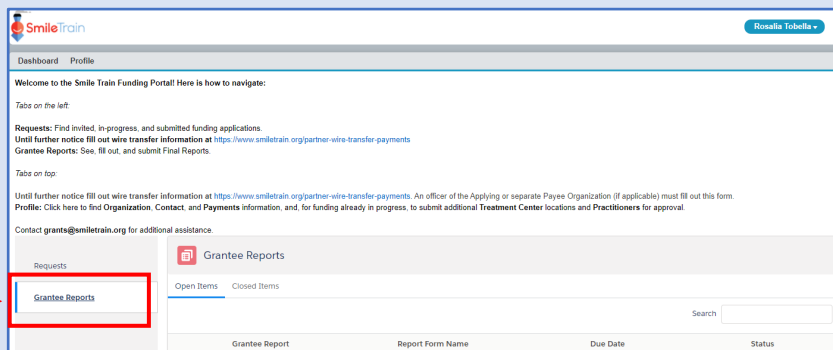
Greetings from Smile Train!

Just a friendly reminder to please complete the report for funds awarded from Smile Train to , due on .

To fill out the report:

- Please log into the Smile Train Grant Portal here: <https://smiletrain.force.com>
- Enter your username and password to continue. Your username is:
- If you have forgotten your password, you can reset it.

- Once you've logged in, click "Grantee Reports" on the left side of the screen to find your report.
- You can save reports in progress, and click "submit" when you are finished.

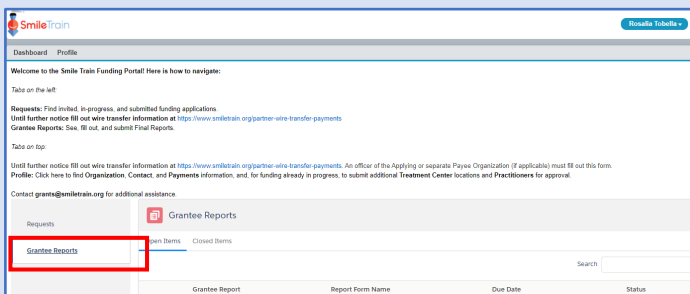


Scenario B: Access Report Form via Portal

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

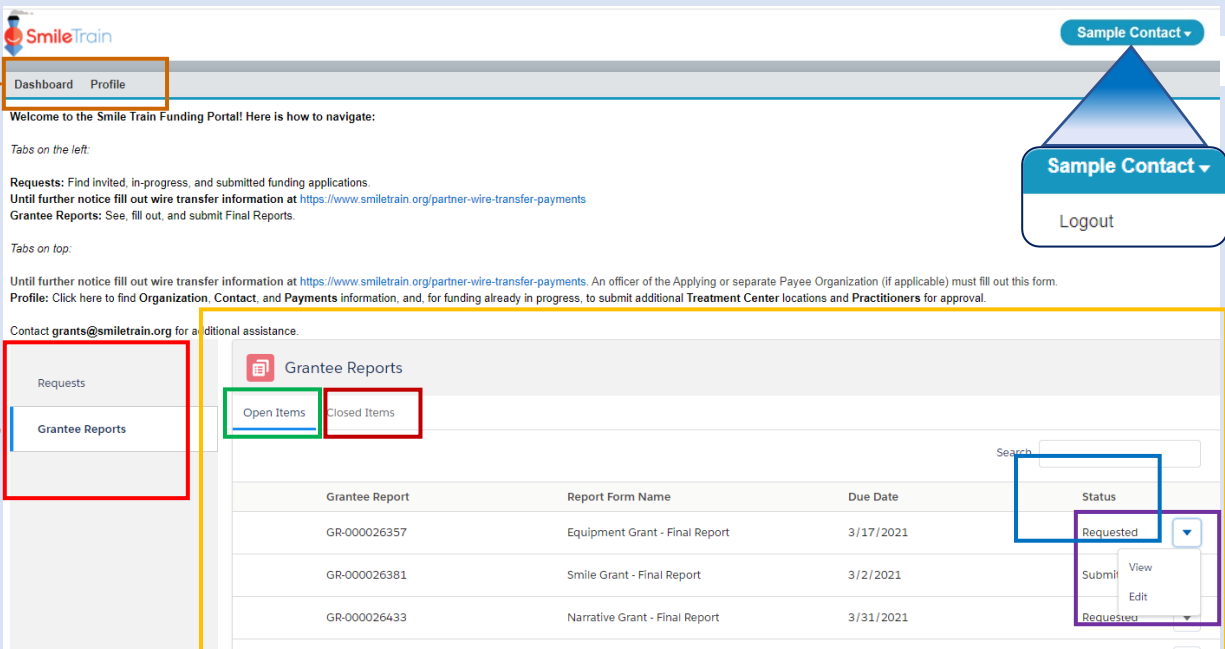
Main Dashboard

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.*



The screenshot shows the Smile Train Funding Portal dashboard. Key elements include:

- Top Navigation Bar:** Contains 'Dashboard' and 'Profile' tabs. A 'Sample Contact' button is in the top right.
- Left Navigation Bar:** Contains 'Requests' and 'Grantee Reports' tabs. A red box highlights the 'Grantee Reports' tab.
- Grantee Reports Section:** Features 'Open Items' and 'Closed Items' tabs. A green box highlights the 'Open Items' tab.
- Table:** Displays a list of reports with columns: Grantee Report, Report Form Name, Due Date, Status, and Requester. A blue box highlights the 'Status' column, and a purple box highlights the 'Requester' column.
- Search and Action Buttons:** A search bar is at the top right. Below it, a dropdown menu shows 'Requested', 'Submitted', 'View', 'Edit', and 'Requester'.

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

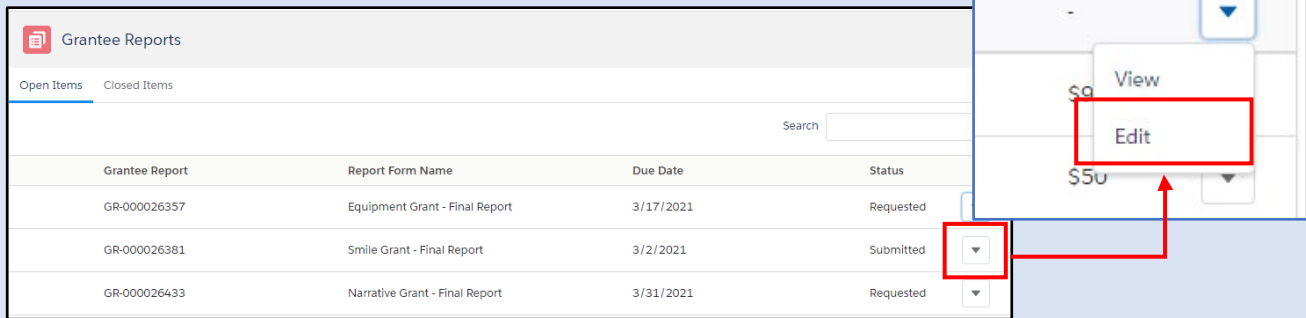
Note

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.



The screenshot shows a table titled "Grantee Reports" with tabs for "Open Items" and "Closed Items". The table has columns for "Grantee Report", "Report Form Name", "Due Date", and "Status". A dropdown menu is shown for the "Submitted" status, with "Edit" highlighted.

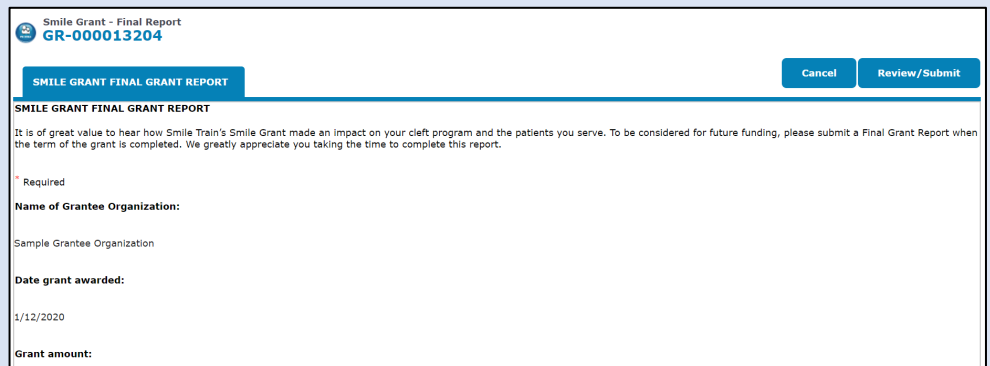
Grantee Report	Report Form Name	Due Date	Status
GR-000026357	Equipment Grant - Final Report	3/17/2021	Requested
GR-000026381	Smile Grant - Final Report	3/2/2021	Submitted
GR-000026433	Narrative Grant - Final Report	3/31/2021	Requested

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**.



The screenshot shows the "Smile Grant - Final Report" form for grant ID GR-000013204. The form includes a title bar, a "Cancel" button, and a "Review/Submit" button. The main content area contains a "Name of Grantee Organization" field, a "Date grant awarded" field, and a "Grant amount" field. A "Required" label is present next to the "Name of Grantee Organization" field.

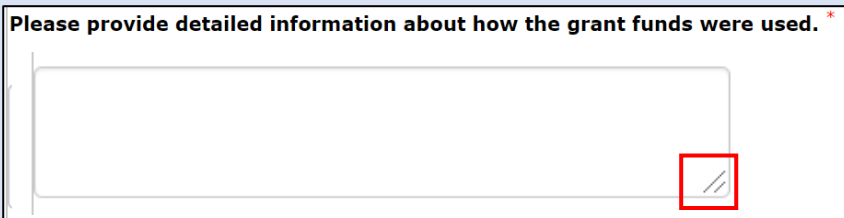
Working with Reports in the Smile Train Portal, continued

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 the attachment to the report.

Please submit at least one of the following

- A story with photos and/or video of a patient you have helped as a direct result of this funding along with the specific method of awareness employed in bringing this patient to your hospital/organization for cleft treatment.
- It is very helpful to share stories with donors that are from the perspective/voice of the patient and/or family helped.
- Photos/video footage of your awareness campaign.

Please follow this link for directions on how to share video & other large files with us: smiletrainexpress.org/story.asp

Attachment #	File Name	Attachment Description (Optional)	Created Date	Action
No Attachments				
		Attachment Description (Optional)		

0 of 1000 Characters

Choose file **Upload**

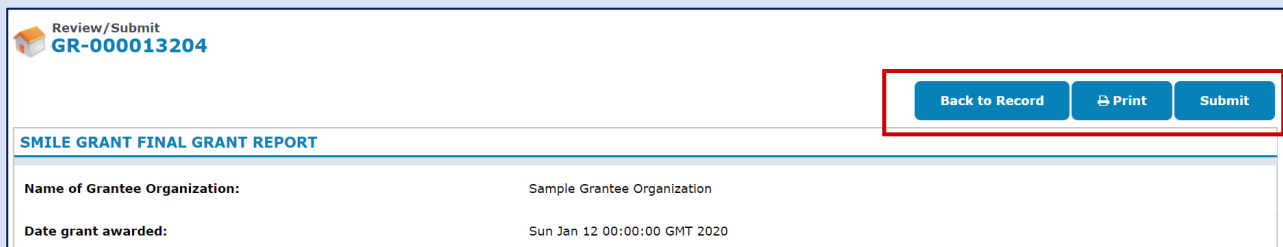
No file chosen

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.



Review/Submit GR-000013204	
SMILE GRANT FINAL GRANT REPORT	
Name of Grantee Organization:	Sample Grantee Organization
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.