

National Research Grant Application

Collaborator and Editor Invitation Instructions

Overview

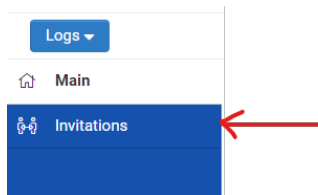
The invitation feature allows only the Primary Investigator (PI) (the applicant) to “invite” members of the grant team to the application to assist in completing the application and Foundation required reports (i.e., progress reports, financial reports, etc.). When a concept paper or full application is in a Draft or later status the invitation feature is available to use. Once the invitation process is complete the invitee will have the same type of portal and access to the grant application as the PI. What an invitee can do in the application is limited by the role that the PI selects. There are two types of roles:

1. **Collaborators:** People invited as a Collaborator can **EDIT** and **SUBMIT** the application and reports on behalf of the PI. Once the application and/or report is submitted it is a final submission (i.e., the PI and all invitees will no longer have access to make edits to the submission).
2. **Editors:** People invited as an Editor can only **EDIT** the application and reports for the PI. The **SUBMIT** function is **not** available to an Editor.

There is no limit to the number of collaborators or editors that may be invited to a research application, however, a PI should carefully consider the number of invitees and type of access given to protect the security, confidentiality, and the integrity of the application process.

PI Invitation Instructions

The PI will login to their application portal and open the application. On the left hand side of the application screen click on the Invitations box.



The invitations feature will open. Click on the + sign to enter the invitee’s information and select their role. Click the **Save** button and **then** click the **Invite** Button. Once invited the status will change to Invited.

An applicant is able to invite people to help complete the application and any subsequent reports due to the Foundation, by clicking the "+" button on the bottom left. Once a Collaborator or Editor has accepted the invitation (sent via email once the applicant clicks the "Invite" button), they will have the same view of the grant portal that an applicant has. Please choose the correct level of access to the grant portal.

Collaborators: Can EDIT and SUBMIT grant application and report forms. Choose this option if you want someone to have the ability to edit and submit forms on an applicant's behalf. Once a form is submitted it cannot be "unsubmitted."

Editors: Can EDIT application and report forms but CANNOT submit them. They will use the "Save" button to save changes to a form. Use this option if an applicant wants to review the form and any edits to it before that it is submitted to the Foundation.

| Salutation | First Name | Last Name | Email | Role | Status |
|------------|------------|-----------|-------|------|--------|
| | | | | | |

Save Invite

An applicant is able to invite people to help complete the application and any subsequent reports due to the Foundation, by clicking the "+" button on the bottom left. Once a Collaborator or Editor has accepted the invitation (sent via email once the applicant clicks the "Invite" button), they will have the same view of the grant portal that an applicant has. Please choose the correct level of access to the grant portal.

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| Salutation | First Name | Last Name | Email | Role | Status |
|------------|------------|-----------|--------------------------|--------------|--------|
| Ms. | Sally | Hall | tgf@gerberfoundation.org | Collaborator | Draft |

Save Invite

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| Salutation | First Name | Last Name | Email | Role | Status |
|------------|------------|-----------|-------|--------------|---------|
| Ms. | Sally | Hall | | Collaborator | Invited |







Save Invite

Once the invitee accepts the invitation, the PI's invitation status will change to "accepted".

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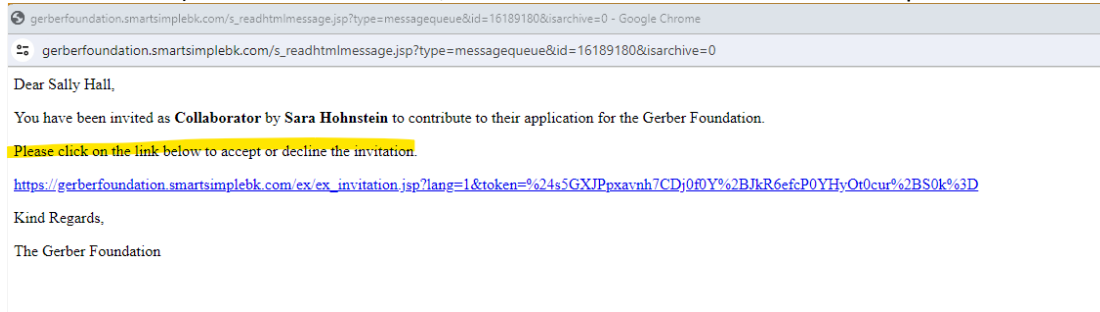
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Editors: Can EDIT application and report forms but CANNOT submit them. They will use the "Save" button to save changes to a form. Use this option if an applicant wants to review the form and any edits to it before that it is submitted to the Foundation.

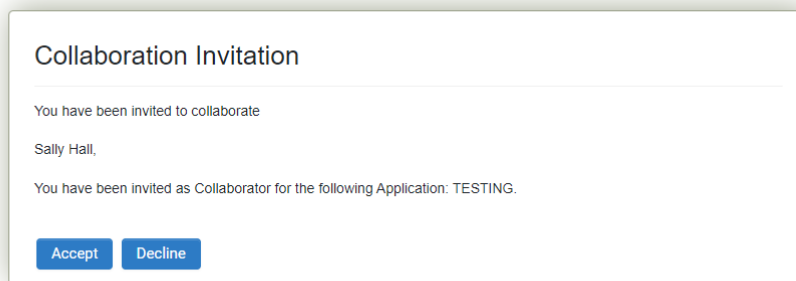
| | Salutation | First Name | Last Name | Email | Role | Status | |
|-----------------------------------------------------------------------------------|------------|------------|-----------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|----------|-------------------------------------------------------------------------------------|
|  | Ms. | Sally | Hall |  | Collaborator | Accepted |  |
|  | | | | | | | |
| | | | |  |  | | |

Invitee (Collaborator/Editor) – Invitation Instructions

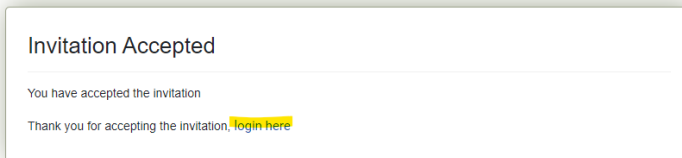
Once invited by the PI, the collaborator/editor (the invitee) will receive an email from notifications@gerberfoundaton.org, SUBJECT: Invitation to Collaborate (or Edit depending on the role the PI selected). The email will state, “Please click on the link below to accept or decline the invitation”.



Once the invitee clicks on the link, in the popup window, they must accept or decline the invitation.



Once the invitation is accepted a second popup window appears and the invitee will begin the registration and login process by clicking on the “login here” link.



Once the “login here” link is clicked, an Organization and Applicant Registration form opens. **If the invitee already has an account established in the application system and is a returning user they must click on the “click here” link at the top of the form to go straight to the login page.**

Organization and Applicant Registration

Complete the fields below. All fields marked with an asterisk (*) are required fields.
If you are a returning user, [click here](#) to login.

Organization Information

If the invitee is new to the application system, they must complete the Organization and Applicant Registration form (see below) before they can login.

Organization and Applicant Registration

Complete the fields below. All fields marked with an asterisk (*) are required fields.
If you are a returning user, click [here](#) to login.

Organization Information

* Organization Name
[Text Field]

* Phone
[Text Field]

* State
[Dropdown: -- Select One --]

Fax
[Text Field]

* Address
[Text Field]

* City
[Text Field]

* Zip Code
[Text Field]

Applicant Information

[Copy Address](#)

* Email
john.easter@comcast.net

* Salutation
[Dropdown]

* First Name
John

* Last Name
Easter


* Phone
[Text Field]

* Address
[Text Field]

City
[Text Field]

* State
[Dropdown: -- Select One --]

* Zip Code
[Text Field]

I'm not a robot 

[Submit](#)

Once the registration form is completed and submitted a popup screen will appear with a “login here” link. Click on the link to be redirected to the Login page.

At the login page enter the email used at registration and click on the Forgot Password link. The application system will send the invitee an email with a link to activate the account and set the password. NOTE: the email will come from notifications@gerberfoundation.org. If the email is not received after few minutes check the junk/spam folder.


The Gerber Foundation


The mission of The Gerber Foundation, to enhance the quality of life of infants and young children in nutrition, care, and development, has remained the guiding beacon for Foundation giving throughout its history. Accordingly, priority is given to projects whose primary beneficiaries are young children from birth to three years of age.
The Foundation provides three main avenues for funding:

- Pediatric Research grants focused on nutrition or health issues of infants and toddlers (ages 0-3)
- West Michigan grants focused on youth programs (ages 0-18) in a small 4-county region
- Scholarships for students graduating from select high schools in Newaygo, Muskegon, and Oceana Counties, Michigan

If you are new to the system, please register by using the appropriate registration button below. For Research and West Michigan grants, select the appropriate 'Grants Registration' button. For Scholarships, select the 'Scholarship Registration' button. If you have already registered, please use the login area on the right.
Note: Click [here](#) for Browser requirements.

Login

 Email

 Password

[Log In](#)

[Forgot Password?](#)

Copy of email message to activate account:

View Message

From: notifications@gerberfoundation.org
To: john.easter@comcast.net
Subject: Welcome to Gerber Foundation

CC:
BCC:
Created: March 29 2024 11:25

Dear John Easter,

Welcome to the Gerber Foundation.

Please go to the address below to activate your account and set your password.

https://gerberfoundation.smartsimplebk.com/ex/ex_activate.jsp?lang=1&token=%24txw9S2PLcoKK05bpODJgkKet30nVGEPMACxmEjJNriM0U9xnqJZ4pOYSj3HNzqPHyHU0HzzNPexBK4JFUsxNw%3D%3D

Once you have activated your account and set a password, log in at the address below.

Address: https://gerberfoundation.smartsimplebk.com/s_Login.jsp

Username: john.easter@comcast.net

Kind regards,

The Gerber Foundation Team

Copy of account activation page. Enter a password and click on submit.

Account Activation

New Password:

Confirm Password:

Policy:

- ✖ Password must have at least 8 characters
- ✖ Password must have at least one lowercase letter
- ✖ Password must have at least one uppercase letter
- ✖ Password must have at least one number
- ✖ Password must have at least one special character

Once the invitee logs in, the portal will look identical to the PI's portal. The application is found under the "Applications" blue bar. Click the Open button to open the application. All reports are found under the "My Action Items" blue bar. Click on the open button to open the report.

The screenshot shows the Gerber Foundation RMS360 portal. The top navigation bar includes the logo and a 'Home' link. The main content area is divided into three sections:

- Welcome to RMS360:** A welcome message with a note about browser requirements and details about grant programs (Novice grants, Regular research grants). It also lists program areas: Pediatric Nutrition, Pediatric Health, and Environmental Hazards.
- Open Calls:** A table listing available grants. One call is visible: "2024 Fall Research Grants (Concept Papers Due May 15 at 4pm ET)" with a status of "Open" and a deadline of "May 15, 2024 16:00:00 Eastern".
- Applications:** A table showing the user's current applications. One application is listed: "National Research Grants" with a status of "Draft" and a project ID of "10887".
- My Action Items:** A section for reports due during the funding period. It shows two items: "Progress Report" and "Final Report", both for "National Research Grants" and in "Draft" status, with due dates of "08/31/2023".