National Research Grant Application Collaborator and Editor Invitation Instructions

Overview

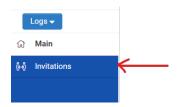
The invitation feature allows only the Primary Investigator (PI) (the applicant) to "invite" members of the grant team to the application to assist in completing the application and Foundation required reports (i.e., progress reports, financial reports, etc.). When a concept paper or full application 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. <u>Collaborators</u>: 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. <u>Editors</u>: 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.

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Editors: Can EDIT application and r	report forms but CANNOT submit them. Th	hey will use the "Save" button to save	changes to a form. Use this option if an applicant wa	nts to review the form and any edits to	it before that it is submitte	ed to the Foundation.
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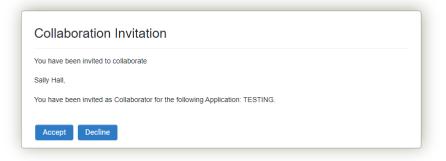
Once the invitee accepts the invitation, the PI's invitation status will change to "accepted".

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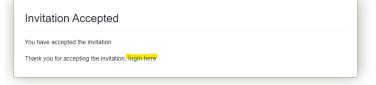
Invitee (Collaborator/Editor) - Invitation Instructions

Once invited by the PI, the collaborator/editor (the invitee) will receive an email from <u>notifications@gerberfoundaton.org</u>, 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". gerberfoundation.smartsimplebk.com/s_readhtmlmessage.jsp?type=messagequeue&id=16189180&isarchive=0 Dear Sally Hall, You have been invited as Collaborator by Sara Hohnstein to contribute to their application for the Gerber Foundation. Please click on the link below to accept or decline the invitation. https://gerberfoundation.smartsimplebk.com/ex/ex_invitation.jsp?lang=1&token=%24s5GXJPpxavnh7CDj0f0Y%2BJkR6efcP0YHyOr0cur%2BS0k%3D Kind Regards, The Gerber Foundation

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.

Complete the fields below. All fie If you are a returning user, click I	elds marked with an asterisk (*) are required fields. here to login.	
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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 <u>notifications@gerberfoundation.org</u>. If the email is not received after few minutes check the junk/spam folder.

The Gerber Foundation	Login
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:	john.easter@comcast.net PPassword Log In
 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 	Forgot Password?
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.

Copy of email message to activate account:

View Message		
From: notifications@gerberfoundation.o	rg CC:	
To: john.easter@comcast.net	BCC:	
Subject: Welcome to Gerber Foundation	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 s https://gerberfoundation.smartsimplebk.com/ex/ex_activate.	set your password. jsp?lang=1&token=%24txw9S2PLcoKK05bp0DjgkWet3OnVGEPMAcxmEjJNriM0U9xnqJZ4p)0YSj3HNzqPHyHU0HzzNPexBK4JfUsxNxw%3D%3D
Once you have activated your account and set a password, log Address: https://gerberfoundation.smartsimplebk.com/s_Log Username: john.easter@comcast.net		
Kind regards,		
The Gerber Foundation Team		

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

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
	8 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.

Welcome to RMS360*		+	Open Calls					+
Note: Click here for Browser requirements.		-						1-1 of 1 <
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