

Webinar: 18 Feb 2025



All about variations

Questions & Answers

Q: How can i update the system so i can see the changes and find the variation form? that is not visible for us

A: The Variations functionality is currently only switched on for accounts who request it directly. Send us an email at service@smartygrants.com.au and we can switch this on in your account.

Q. Sorry, can variation types and reasons be others than those outlined.

A. Yes, the sample form templates and the questions within them can be edited as required.

Q. To use existing milestones standard section, do you need to have this section in the application form?

A. Essentially that is correct. There needs to be a response(s) to a standard field or question within a standard section for a response to populate into that field/section in a form. While it is part of the standard field/section functionality to allow a response to be edited via the standard field tab, which would allow that response to populate, fields/sections are most often populated by them being in a form that is submitted.

Q. Since this is a form triggered by the applicant/awardee - how will the admin team know that a variation has been requested?

A. A task is created when an applicant uses the self-serve variation request. If the form is added by a manage user, a task can optionally be created as part of that process.

Q. Is the variation request linked to standard fields?

A. No.

Q. Can you please share a link to "Standard Sections" resources? I have not used them before.

A. <https://help.smartygrants.com.au/standard-sections/>

Q. Will the templates you've just shown us be available to us when we turn the Variations tab is turned on?

A. Yes.

Q. How do we know the form is submitted?

A. The variations tab at application level will show the status of the form. You could consider adding a Bcc to the [confirmation of submission email](#) or creating a [recurring task](#).

Q. Can you please share pdf examples of the form so we can check if we want to opt in.

A. Sure, please email is at service@smartygrants.com.au.

Q. Is there an extra cost for this function?

A. No.

Q. I hope I am right in saying this, but there are challenges if you use the variation request form for them to update their SFs, as this will then update their application/project SFs and you (the Organisation) may not approve the variation request/information, so this impacts the SFs/data. Therefore you need to do read only SFs in the request form. We then setup Variation Request SFs to manage their request/new information within the request form.

A. This is correct. Editability of a standard field or standard section should always be considered when adding them to a form.

Q. If an Acquittal form is already open (we add ours at approval), and the applicant completes a Variation form, will the updated data (e.g. Milestones) populate to the open Acquittal form?

A. In this case, the acquittal form would need to be re-added to the application for the new data to populate

Q. Is the variation ID a reference field?

A. No.

Q. Is the due date set by the applicant?

A. No. The task and form due date are not assigned when an applicant requests a variation via the self-serve option. The onus is on the manage user to update these details.

Q. Does anything with a standard field automatically get written over if its in the form - even if they don't enter new info? (ie if they haven't selected those options of what they want to change) If the variation is NOT approved do you have to manually take the standard fields back to the original?

A. Standard field and section responses will only be populated on the submission of an external form, in line with the existing standard field/section functionality. If an editable standard field or question in a standard section already has a response against it, and the form has that question set as editable, then any 'new' response will overwrite the existing response. This is not specific to variations, but the function in general. It is always important to be aware of this when adding editable standard field/sections to forms.

Q. If an applicant changes their variation form, does the program manager get notification?

Commented [EH1]: A new response will overwrite an existing response if an editable standard field or question in a standard section has the question set as editable.

A. No. The content of external forms is not the property of a manage user until that form is submitted. This rule also applies to open application or acquittal forms.

Q. Do the variation decisions also show on the decisions screen?

A. Under the variations tab, yes they do. Under the decision tab, they do not.

Q. We would appreciate if the Decided by can be edited to be the approvers name (not the person updating this tab). Our approver is often above and beyond the people that have access to Smarty Grants.

A. SmartyGrants can only record the actions of users that have been provisioned as users in the instance. If the decision maker is not a user, then SmartyGrants is unable to automatically record that information. If this is required, and the decision maker cannot or will not be a user, then we suggest having a field in the form to capture that information.

Q. We would also really appreciate an approved date and an executed date. Approved being the date it was approved and executed, the date that the recipient signed an updated FA/COG.

A. As mentioned, the contents of your forms are up to you. If you would like these things in them, please add them.

Commented [EH2]: You can capture this information by adding relevant questions to your form.

Q. What if the variation reduces the amount of funding?

A. The original amount approved is intended to show exactly that. If the amount decreases, then you will have a total amount allocated that is less than the original amount approved. Returned and cancelled payments can be used to reflect this or, the original allocations can be edited. The actual amount being more or less will not impact the original amount approved response.

Q. Is the original amount approved field now added to all applications whether they apply for a variation or not?

A. Yes. Variations will need to be enabled on the instance but, once this is done, the decision tab at application level will include this field.

Q. Is it possible to identify the difference between initially approved funds and variation funds within the decision tab?

A. Yes. Each allocation and payment has a notes field. The contents of the notes are not displayed directly however can be reported on and accessed via the Options button for each allocation or payment.

Q. How will the reporting look? Would it be an additional page in the template?

A. Yes, the system will generate a sheet in an excel workbook for the form responses. Existing templates would need to be edited to include these responses if required in the report output.

Q. What if a grant is terminated? can we add that as a decision option?

A. "Terminated" is not a decision option, but you could use Declined.

Q. Can you confirm how a grant maker will know if a grantee has submitted a self-serve form?

A. You can complete the task that is automatically created as it will link to the application and the variation tab will show the form status. Also, you can add a "bcc" to the recipients of the [confirmation of submission email](#) so that you get a copy and are 'notified' of the submission. You may also consider a [recurring task](#).

Q. Will this become an optional feature under user access

A. Access to the decision tab of an application is not an optionally displayed feature. Only users of standard user level or above have access to it.

Feedback Comments

Feedback

Thank you.

Thank you, David and Kat.

Thanks. Will need a follow up contact I think.

Thank you both.