Help Guide for Assessors

Welcome to SmartyGrants! SmartyGrants is a powerful online system used by grantmakers to manage the entire cycle of a program from application to evaluation.

You can access SmartyGrants to view and assess applications a grantmaker has assigned to you.

This guide provides step-by-step instructions for logging on and completing an assessment using SmartyGrants. If you'd prefer to watch a video tutorial, click here.

Questions?

For any specific questions in regards to the grants program, assessment guidelines or criteria, please contact the grantmaker you are working with. For any technical questions, contact the SmartyGrants Support Team.

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System requirements

To access SmartyGrants you need an Internet browser and an Internet connection.

Compatible browsers

SmartyGrants is compatible with current versions of the following browsers. We endeavour to ensure backward compatibility with previous versions of these browsers, although there may be limitations.

	Google Chrome
	Safari
	Firefox
	Microsoft Edge

Getting started

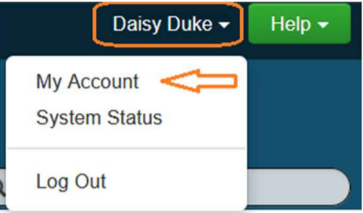|	
Login	When the grantmaker sets up your account, you will receive an email containing your username and password. If you lose this information, the grantmaker can re-send it to you. To log in, visit https://manage.smartygrants.com.au (AU/UK) or https://manage.smartygrants.co.uk (EU/UK) and enter in your login details. Once logged in, you will see a screen similar to the one below, where it lists the program(s) you have access to.
Change password	When you log in for the first time, you should change your password to something that you will easily remember: Select the **drop down** arrow next to your name in the top right of the screen, then select **My Account**. 2. Enter your old password, followed by your preferred new password. Ensure you meet the listed password requirements. Repeat the preferred password, and select the **Change Password** button. Select the account name link at the top left of the screen to return to the homepage.

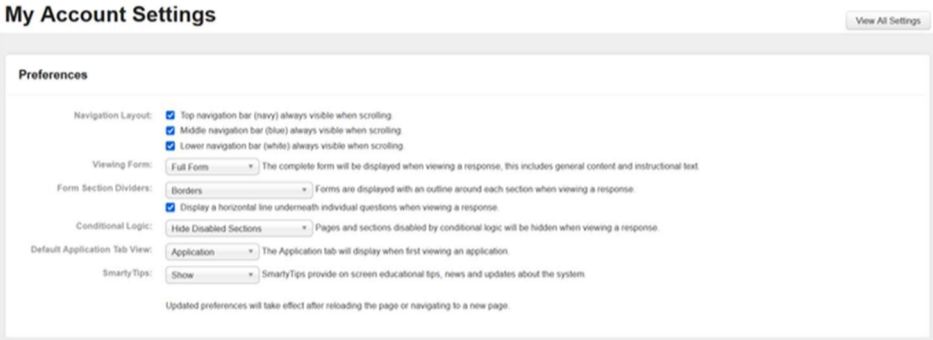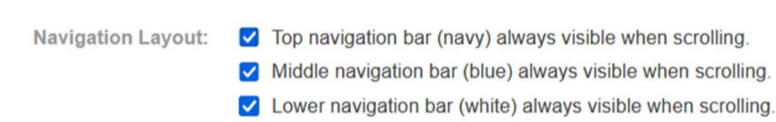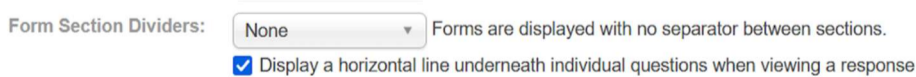|	
	Users are able to edit the their account settings via the My Account option. To access the My Account Settings screen: Select the **drop down** arrow next to your name in the top right of the screen, then select **My Account**. The preferences that can be edited, the default settings applied to all accounts, and the options available to be edited are shown in the screen shot below. Continue down the page for explanations of the individual preferences and instructions on how they can be edited. ### Navigation Layout Change how you view the navigation bar on each screen. You can deselect either the Top, Middle or Lower Navigation options by unchecking the relevant tick boxes in My Account Settings. These preferences will only be visible once you reload or move to a new page. If you are frequently viewing forms, deselecting these options will result in form responses taking up more of the screen when you scroll down. ### Viewing Form Chose whether you wish to view form responses in full (including general content and instructions), or restrict your view to **Responses Only**. Select the **drop down arrow** next to the currently selected option to edit. By default, **Full form** is selected, which means manage users will see the entire form document including any additional text provided as applicant instruction, plus applicant responses. The **Responses only** option will hide all additional text, instructional information and general content from the form for a manage user. This option will not impact what the applicant will see. ### Form Section Dividers When viewing form responses, you might want to enhance clarity by incorporating dividers to make it easier to distinguish between sections or individual questions in a form. There are three options: - None (no dividers) - Horizontal Line (a single horizontal line separates each section of the form) - Borders (a rectangular box border around each section of the form) To choose your preferred option, select the **drop down arrow** in the box next to **Form Section Dividers**. An additional option is present to also include a horizontal line between individual questions. Select the **check box** to toggle this option. Please see examples below of these formatting choices within a form: **Example 1: Horizontal Line only:**

Account Preferences	Users are able to edit the their account settings via the My Account option. To access the My Account Settings screen: Select the **drop down** arrow next to your name in the top right of the screen, then select **My Account**. The preferences that can be edited, the default settings applied to all accounts, and the options available to be edited are shown in the screen shot below. Continue down the page for explanations of the individual preferences and instructions on how they can be edited. ### Navigation Layout Change how you view the navigation bar on each screen. You can deselect either the Top, Middle or Lower Navigation options by unchecking the relevant tick boxes in My Account Settings. These preferences will only be visible once you reload or move to a new page. If you are frequently viewing forms, deselecting these options will result in form responses taking up more of the screen when you scroll down. ### Viewing Form Chose whether you wish to view form responses in full (including general content and instructions), or restrict your view to **Responses Only**. Select the **drop down arrow** next to the currently selected option to edit. By default, **Full form** is selected, which means manage users will see the entire form document including any additional text provided as applicant instruction, plus applicant responses. The **Responses only** option will hide all additional text, instructional information and general content from the form for a manage user. This option will not impact what the applicant will see. ### Form Section Dividers When viewing form responses, you might want to enhance clarity by incorporating dividers to make it easier to distinguish between sections or individual questions in a form. There are three options: - None (no dividers) - Horizontal Line (a single horizontal line separates each section of the form) - Borders (a rectangular box border around each section of the form) To choose your preferred option, select the **drop down arrow** in the box next to **Form Section Dividers**. An additional option is present to also include a horizontal line between individual questions. Select the **check box** to toggle this option. Please see examples below of these formatting choices within a form: **Example 1: Horizontal Line only:**

Example 2: Borders only:

Example 3: Section Borders and Individual Questions:

Conditional Logic

When a form includes Conditional Logic, all disabled pages or sections are shown by default. This preference allows the user to hide any pages or sections that have been disabled where Conditional Logic was applied to the form. To hide any disabled pages or sections when viewing a form, select the drop down arrow in the box and select Hide Disabled Sections.

Default Application Tab View

Choose the first tab that will display when viewing an application record. By default, the system will display the **Application** tab when first opening an application record.

To change this view select the **drop down arrow** in the box and select your preferred tab.

	SmartyTips SmartyTips provide on screen educational tips, news and updates about the system. You can hide these tips by selecting **drop down arrow** in the box and selecting **Hide**. SmartyTips: [Show ▼] SmartyTips provide on screen educational tips, news and updates about the system.

Locate your applications	1. Log in to SmartyGrants and click into the program you have been given access to. **Programs** **Select a Program** Program Name Small Grants ← Assessor 2. Once you click into the program you have access to, you will see you now have a **list of tasks** that you need to complete for that program. Grantmakers use tasks in order to track the progress of assessors throughout the assessment process. Tasks will also assist you in tracking your own progress. You will see when you first click into your program, that the status of your tasks is set to "Not Started". **Small Grants** Tasks **Tasks** 8 items [Columns] Task Name	App No	Assignee	Due Date	Status	Completed By	Actions Assessment	SG2016001	Charlie Harte	20/06/2016	Not started		Options ▼ Assessment	SG2016002	Charlie Harte	20/06/2016	Not started		Options ▼ Assessment	SG2016003	Charlie Harte	20/06/2016	Not started		Options ▼ Assessment	SG2016006	Charlie Harte	20/06/2016	Not started		Options ▼ Assessment	SG2016007	Charlie Harte	20/06/2016	Not started		Options ▼ Assessment	SG2016008	Charlie Harte	20/06/2016	Not started		Options ▼ Assessment	SG2016009	Charlie Harte	20/06/2016	Not started		Options ▼ Assessment	SG2016011	Charlie Harte	20/06/2016	Not started		Options ▼

Review the Application	1. To review an application, select its **Application ID**. 2. Scroll down to review the application form/s online.

Note: to view any attachments or download a copy of the application form, select the **Download** drop-down menu, then select the relevant action.

	Option 1: Navigating from the application form 1. If you have just been reviewing the application form online and wish to begin assessment, select the assessment tab of the application. 2. Once on the assessment tab, select **Add Assessment Form** and choose the assessment form you are required to fill out. *Note: You might have more than one assessment form to select from here. Please check with the grantmaker that you are filling out the correct assessment form before you continue. 3. Once the form is added, you will notice a blue **Fill Out** button. Select this button to begin filling out your form.
Assess the Application	
	Auto-time out feature For security purposes, SmartyGrants has an auto-time out feature enabled. If SmartyGrants has not measured any user activity for **20 minutes** then it will log the user out. If logged out, any unsaved work will be lost. SmartyGrants can only measure activity when data is sent to or requested from the server. This is best done by pressing the 'Save Progress' button. When moving between pages in a form, or navigating from one application to another, or navigating to another area of the system (e.g. back to your Task list) the system auto-saves and resets the timer. It is important to note that SmartyGrants can not measure activity in any other way. For example, typing a response to a question, or answering multiple questions on the same page of a form, **can not be seen as activity.**
	Option 2: Navigating from the tasks tab. 1. If navigating from the tasks tab, to begin assessing an application, select **Options** in the actions column.

2. To begin filling out a form, select the **Fill out form** option.

Filling Out The Assessment Form	1. After selecting **Fill out form**, you will be taken to the assessment form you are required to fill out. From here, you can also select the **Show Application** button, which will split your screen and allow you to view the application on one half of your screen and the assessment form on the other. 2. Once you have selected **Show Application** you will note there is a download button that will allow you to download a PDF of the application, and any attachments that were submitted as part of this application. To hide the application again, select **Hide Application**. 3. You can also elect to **Hide Sidebar** for easier visibility of the application and assessment form. You do this by selecting the Hide Sidebar button on the top right of the screen. **Auto-time out feature** For security purposes, SmartyGrants has an auto-time out feature enabled. If SmartyGrants has not measured any user activity for **20 minutes** then it will log the user out. If logged out, any unsaved work will be lost. SmartyGrants can only measure activity when data is sent to or requested from the server. This is best done by pressing the 'Save Progress' button. When moving between pages in a form, or navigating from one application to another, or navigating to another area of the system (e.g. back to your Task list) the system auto-saves and resets the timer. It is important to note that SmartyGrants can not measure activity in any other way. For example, typing a response to a question, or answering multiple questions on the same page of a form, **can not be seen as activity.**
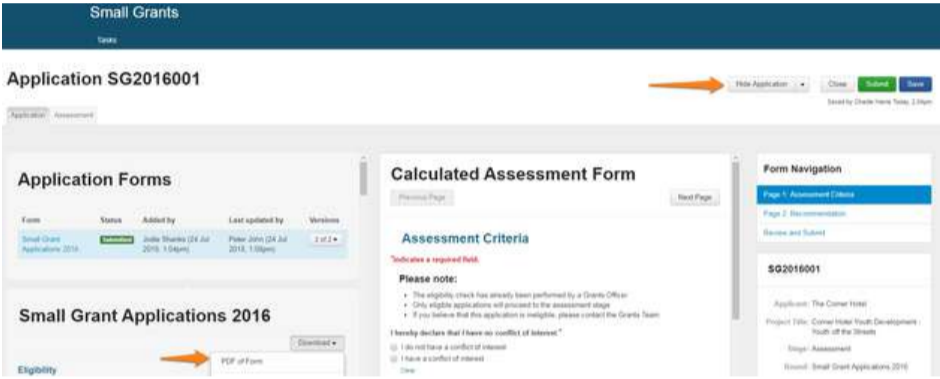
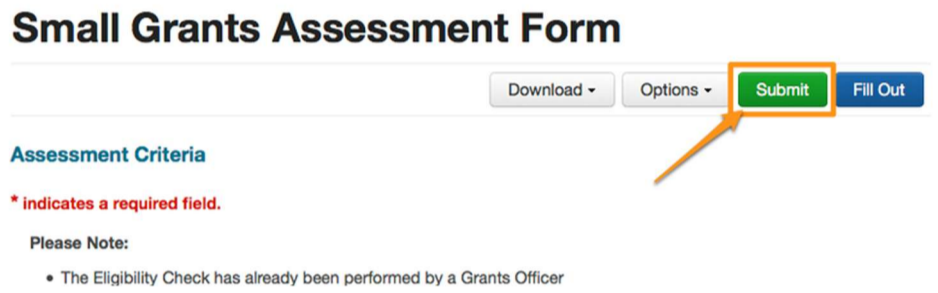|	
Submit your Assessment	Submitting your assessment means that a permanent copy of your assessment, as it stands at the time you select **Submit**, will always be retained with the application. Once an assessment is submitted you can **Reopen** it if you need to make any alterations; however, note reopening an assessment does not alter the original submitted assessment form, but rather creates a subsequent version of the assessment which you can change and submit in turn. There are two ways to **Submit your assessment** form: 1. When you are in 'Fill Out' mode, click the **Submit** button in the top right hand corner: Hide Application ▾ Close **Submit** Save Saved by Frodo Dobbins Today, 11:17am 2. Or, from the Assessment overview tab click the submit button: **Small Grants Assessment Form** Download ▾ Options ▾ **Submit** Fill Out **Assessment Criteria** * indicates a required field. Please Note: • The Eligibility Check has already been performed by a Grants Officer 3. You will be then prompted to confirm the submission. Click **Submit** to confirm: **Submit Form** × Are you sure you want to submit Small Grants Assessment Form 2014 from this application? This will lock the form and save a permanent copy in its current state. You may reopen the form to make modifications at a later date if required. Submit Cancel ***Note:** if required fields within the form have not been completed, you will be warned the form is incomplete, you may not submit until the form is fully completed: Some changes to your application are required before you can submit it. Check the highlighted items and fix them before you submit your application. **Submit Form** × **Form is incomplete** This form cannot be submitted as all fields have not been completed. Please complete the form and correct any issues in order to submit your form. Review Cancel
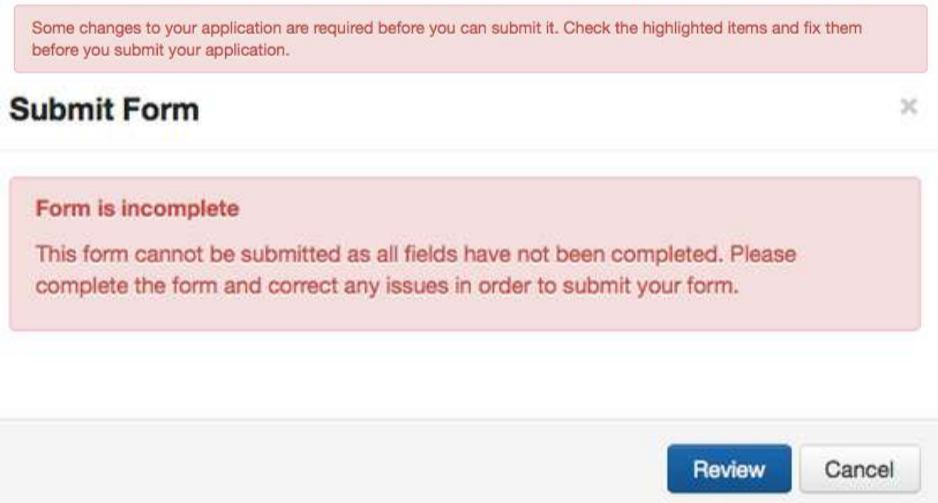
	There are 2 different ways to track your progress. 1. You are able to see which assessments are currently "Not started", "In Progress" or "Completed" via the tasks tab. The Status column includes the status of each task. By default, tasks that are "Not Started" or "In Progress" will appear here. Click "Clear" on the active filter bar to see all tasks, including those that are "Completed". 2. Alternatively, click your **'My Tasks'** button in the top right hand corner of your screen. This will take you to a list of tasks across all programs you have access to. You will be able to view all of your tasks and their status here.
Tracking your progress	*Please note the status column on your tasks will only update if the grantmaker has added this setting to your tasks. If your status column does not update, it is because the grantmaker did not include this setting when setting up your assessment tasks. In this instance you can manually change the status of your task by clicking into the status column and selecting the correct status of your task. **Tasks with Multiple Assignee's:** If you see multiple names against a task, then the task is designed such that any one of you can complete the task. Once someone adds a form, or marks a task as 'in progress', their name will be highlighted in orange. This will allow you to see that another user has started the task, and therefore you do not need to complete this task, unless instructed otherwise.
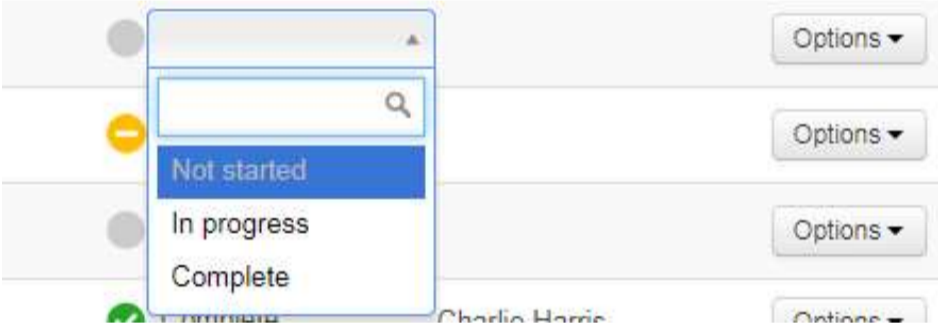
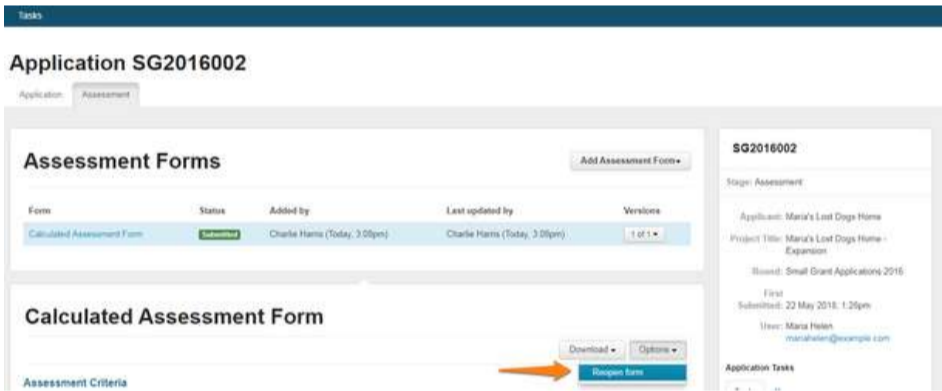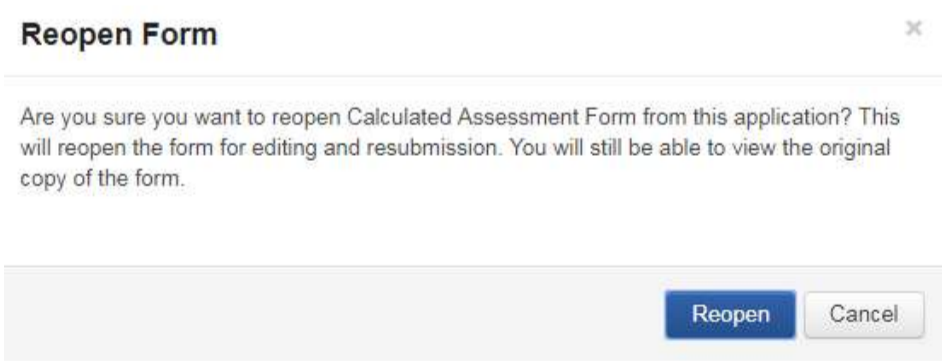|	
Altering your assessments (Reopening your form)	You might find that you need to make changes to a submitted assessment form. To do this, you will need to **reopen** your assessment form. 1. From the tasks tab, click on the options drop-down button and then "View application". You could also click on the application ID number. 2. From the application tab, click across to the assessment tab. Here you will be able to view online your submitted assessment form. 3. Click into your assessment form, and then click onto the options drop-down and "reopen form" 4. A pop-up will appear that will ask you to confirm whether or not you wish to reopen the form. Click the reopen button. 5. Once you click reopen form, you will see that you now have "Version 2 of 2" displaying. Click the blue **Fill Out** button to begin filling out the form again.
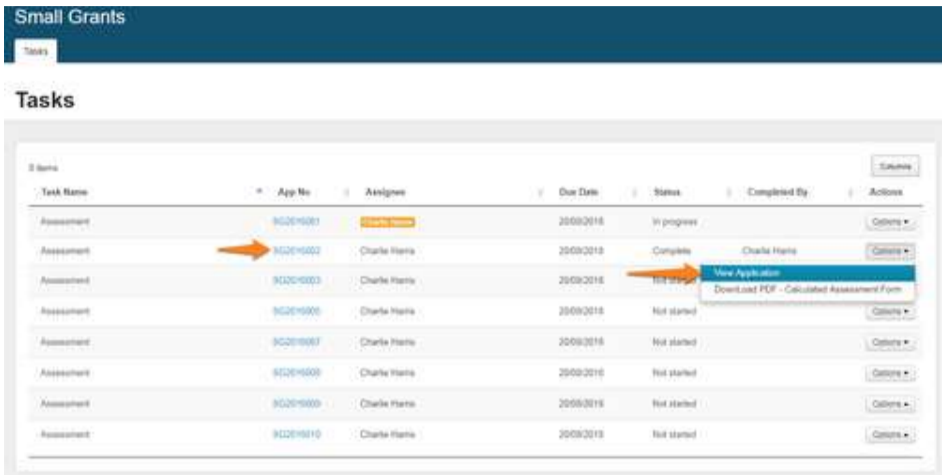
6. Once you have made your changes, you can select the green submit button to submit your assessment form again. You will then be redirected back to the tasks tab.

Assess or View the Acquittal Form/s	**Access to the Acquittal form/s is dependent on the Grantmaker. The Grantmaker must allow permissions for an assessor to view the Acquittal form/s.** • If you have permission, you will see three available tabs once you select an application. • You will then be able to select the **Acquittal tab**. This will list any acquittal forms that the applicant has submitted, if there are multiple forms listed, select the blue link for the specific for you wish to view.

Return to your Applications for assessment	You can return to your list of applications for assessment at any time by selecting the **Tasks** tab at the top left of your screen. A list of all tasks within that program will appear. You can also select your **My Tasks** button in the top right-hand corner of your screen. This will bring you through to a whole list of your tasks across all programs in this account. If you are assessing across multiple programs, this is the easiest way to view all of your assessments in one place.

Auto-time out feature

For security purposes, SmartyGrants has an auto-time out feature enabled. If SmartyGrants has not measured any user activity for **20 minutes** then it will log the user out. If logged out, any unsaved work will be lost.

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