



Post-Award FAQ
SmartSimple Guide

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Suite 900
Arlington, VA 22202
1-800-DIABETES (800-342-2383)
diabetes.org

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Creating or Logging into a SmartSimple Account

- If you have previously applied to or worked with ADA, you are likely already in our system. Please enter your email address and click 'Forgot Password' to proceed.
- If you have never applied for a grant, received an award, or reviewed proposals for ADA, click the 'Register Here' button to start and complete the required fields to create your account.



Login

Log In

Forgot Password?

Privacy & Policies

Privacy & Security policies

New to the System?

Register Here

Welcome to American Diabetes Association

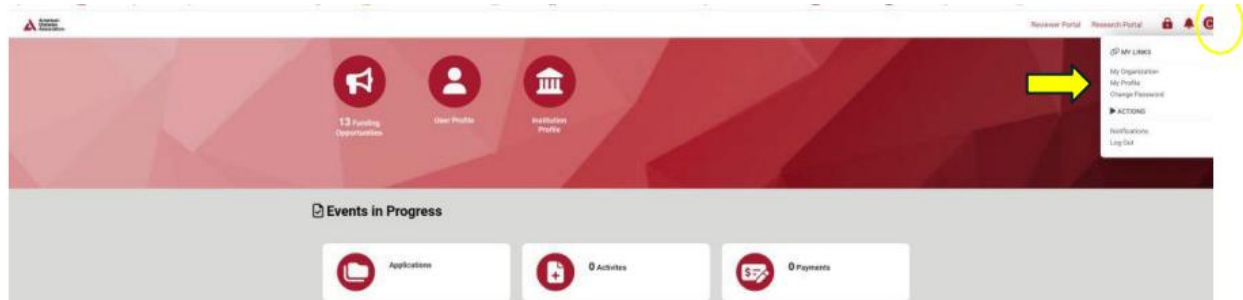
Please login to access the system. If you do not have an account, please create an account using the Register Here button below.

Our Website: [Research Grants](#)

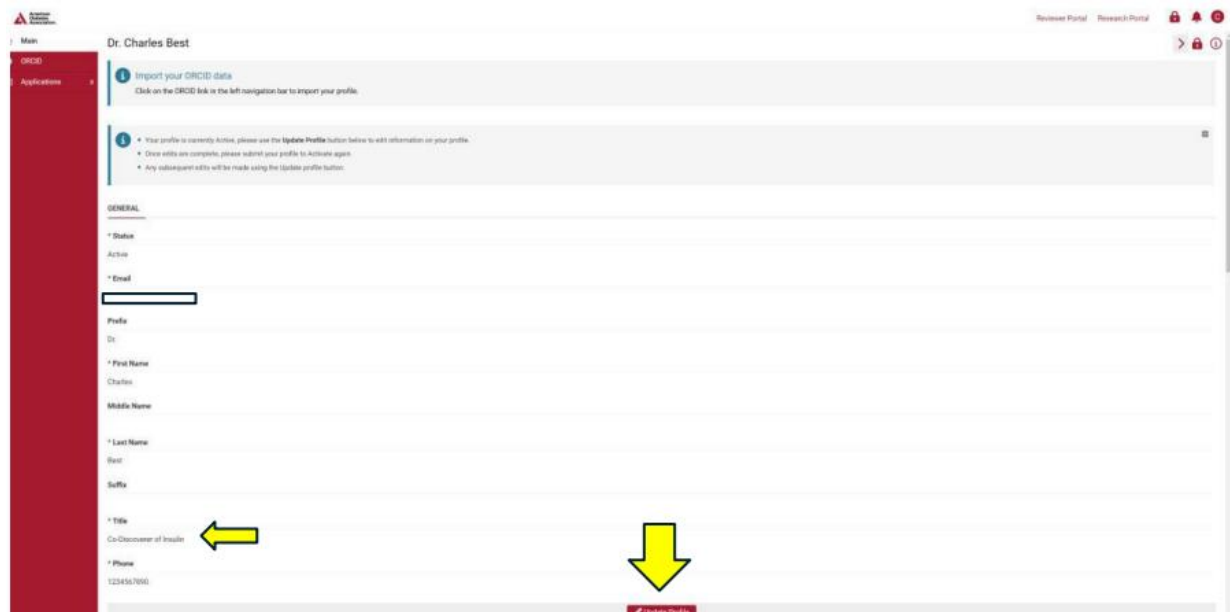
Questions? Contact us at:
Pre-Award: grantquestions@diabetes.org
Post-Award: grantadministration@diabetes.org

Updating Your SmartSimple Account Profile

- Once you have logged into SmartSimple, click on the red circle icon at the top of the page. A dropdown menu will appear; select “My Profile” from the options.



- The page will refresh, displaying your account information. To update this information, click the “Update Profile” button at the bottom of the page. The information entered into your account profile will automatically be included in any future applications you submit in SmartSimple.
- Once you have finished entering your information, scroll to the bottom of the page, click the “Save Draft” button, and then click the “Submit Profile” button. A dropdown menu will appear; select “My Profile” from the options.



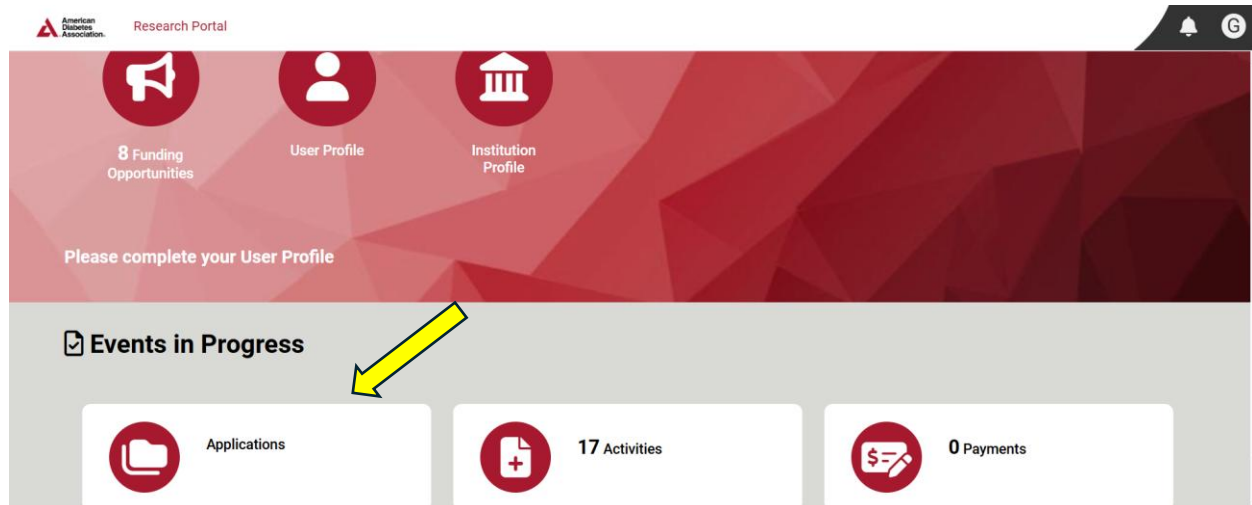
Navigating Your Dashboard

- The page that appears when logging in is known as your “Research Portal” or dashboard. There you will find multiple icons that lead you to necessary grant functions:
 1. New Funding Opportunities: ADA grants that are open for applications
 2. User Profile: your profile where your information is stored
 3. Institution Profile: your institution’s profile and information, can only be updated upon request (contact: grantquestions@diabetes.org)
 4. Applications: where applications that are in process, active grants, or past grants are stored
 5. Activities: where scheduled and upcoming requirements are stored

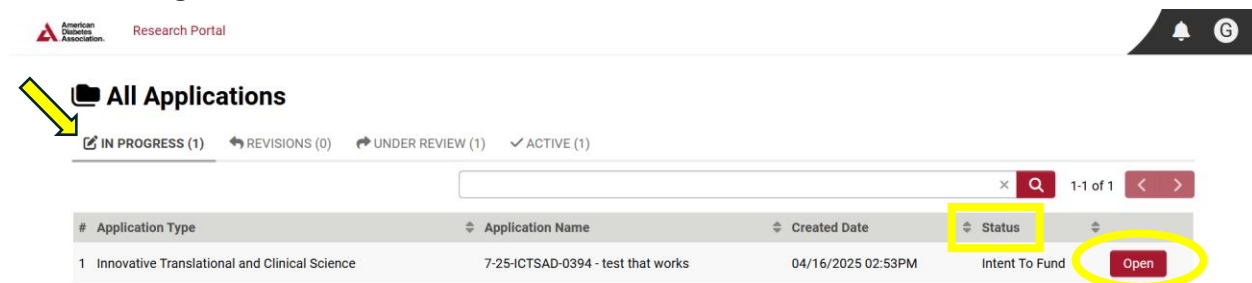


Completing Your Intent to Fund

- When a grant is selected for funding, an email notification is sent out requiring upcoming grantees to login into SmartSimple and complete their Intent to Fund
- The Intent to Fund collects general information for ADA grant administrators such as membership IDs, ethical approvals, project information and banking information
- To complete the Intent to Fund, first select the Applications tab on your dashboard



- Upon selecting the Applications tab, navigate to the “In Progress” tab and select your grant by clicking the “Open” button
- Your grant should have a status of “Intent to Fund”



- Navigate to the “Intent to Fund” tab on your grant

7-25-ICTSAD-0394 - test that works

* Organization: University of ADA

* Principal Investigator: Grant Administration Test Test

* Status: Intent To Fund

Grant ID: 7-25-ICTSAD-0394

Deadline: 04/30/2025

Print Application: [View/Print](#)

Navigation: < Z PRINCIPAL INVESTIGATOR PROJECT CONTACTS PROJECT DETAILS RESEARCH OVERVIEW BUDGET ADDITIONAL ATTACHMENTS ASSURANCE **INTENT TO FUND DETAILS** >

* Eligibility Degree NEXT >

[Save Draft](#) [Submit Materials](#)

- Follow the instructions to fill out the required information
- The last section, called “Providers,” of the Intent to Fund tab requires you to connect your institution’s banking information to your grant
- If your institution has had a grant funded by the ADA before, your banking information is likely already in the system
- Select the binoculars icon next to the “Select Account Detail” box to find your institutions existing bank information

7-25-ICTSAD-0394 - test that works

Navigation: < Z PRINCIPAL INVESTIGATOR PROJECT CONTACTS PROJECT DETAILS RESEARCH OVERVIEW BUDGET ADDITIONAL ATTACHMENTS ASSURANCE **INTENT TO FUND DETAILS** >

Providers (0)

Select Account Detail  Select Roles

[Add Account Detail](#) [+ Add Row](#) [Advanced Lookup](#)

JUMP TO

[Bank Information](#)

0 of 0 < >

☐	Organization	Type	Payee Name (Check Payable to)	Mailing Address	Status	Owner
No Results Found						

[Create new account](#)

[BACK](#)

[Save Draft](#) [Submit Materials](#)

https://diabetes.us-2.smartsimple.com/Apps/app_editopportunity.jsp?listreq...

- After selecting the button, a small pop-up screen will show up with a list of validated/previously submitted banking information from your institution
- Select the correct information from the list, this will cause the Select Account Detail box to populate

Select Account Detail

Organization Type Payee Name (Check Payable to) Mailing Address Status Owner

☐ University of Texas Medical Branch at Galveston	Bank Account			Validated	Grant Administration Test Test
☐ University of ADA	Bank Account	xx	x	Validated	Grant Administration Test Test

- Upon selecting the correct banking information, select the box next to the Account Details titled “Select Role”
- Only one option, “Bank Manager,” should show up in the drop-down menu for you to select

7-25-ICTSAD-0394 - test that works

PRINCIPAL INVESTIGATOR PROJECT CONTACTS PROJECT DETAILS RESEARCH OVERVIEW BUDGET ADDITIONAL ATTACHMENTS ASSURANCE INTENT TO FUND DETAILS

Providers (0)

xx Bank Manager

Add Account Detail + Add Row

Bank Manager

0 of 0

Organization Type Payee Name (Check Payable to) Mailing Address Status Owner

No Results Found

Create new account

BACK

Save Draft Submit Materials

- After adding the account detail and role, select the “Add Account Detail” button to add the information
- When finished, select Save Draft and Submit Materials to submit your Intent to Fund

7-25-ICTSAD-0394 - test that works

Account Detail added

PRINCIPAL INVESTIGATOR PROJECT CONTACTS PROJECT DETAILS RESEARCH OVERVIEW BUDGET ADDITIONAL ATTACHMENTS ASSURANCE INTENT TO FUND DETAILS

Providers (1)

Select Account Detail Select Roles

Add Account Detail Add Row Advanced Lookup

Organization	Type	Payee Name (Check Payable to)	Mailing Address	Status	Owner
☐ Open University of ADA	Bank Account	xx	x	Validated	Grant Administration Test Test

Create new account

BACK Save Draft Submit Materials

- If your institution has not previously been funded by the ADA and no banking information is stored in the system, or the incorrect information is there, select the “Create new account” button

7-25-ICTSAD-0394 - test that works

Providers (0)

Select Account Detail Select Roles

Add Account Detail Add Row Advanced Lookup

Organization	Type	Payee Name (Check Payable to)	Mailing Address	Status	Owner
No Results Found					

Create new account

BACK Save Draft Submit Materials

https://diabetes.us-2.smartsimple.com/Apps/app_editopportunity.jsp?listreqi...

- A pop-up screen will open, follow the instructions to fill in the requested information. The banking information you provide should be vetted through your office of sponsored research prior to adding it
- Once the information is filled out, select the “Submit” button
- Follow the previous steps to attach your new banking information to the Intent to Fund and submit your materials

Create Bank Account

ViewActions

Main

Notes

* Organization:

University of ADA

Owner:

Grant Administration Test Test

Status:

Draft

PAYMENT DETAILS

ADMINISTRATION

Type

Bank Account

* Payee Name (Check Payable to)

* Mailing Address

JUMP TO

Institution's Finance Contact

Save Draft

Submit

NEXT

SmartSimple Requirements

- Active and upcoming requirements can be found in the “Activities” tab on your dashboard
- If the status is “Scheduled,” and the due date is populated, then the requirement is active and needs to be completed by the due date
- An email notification is sent out when requirements are scheduled or sent back for revisions
- If the status is “Draft,” and the due date is not populated, the requirement is not yet active for completion
- Select the “Open” button to access and complete the requirement

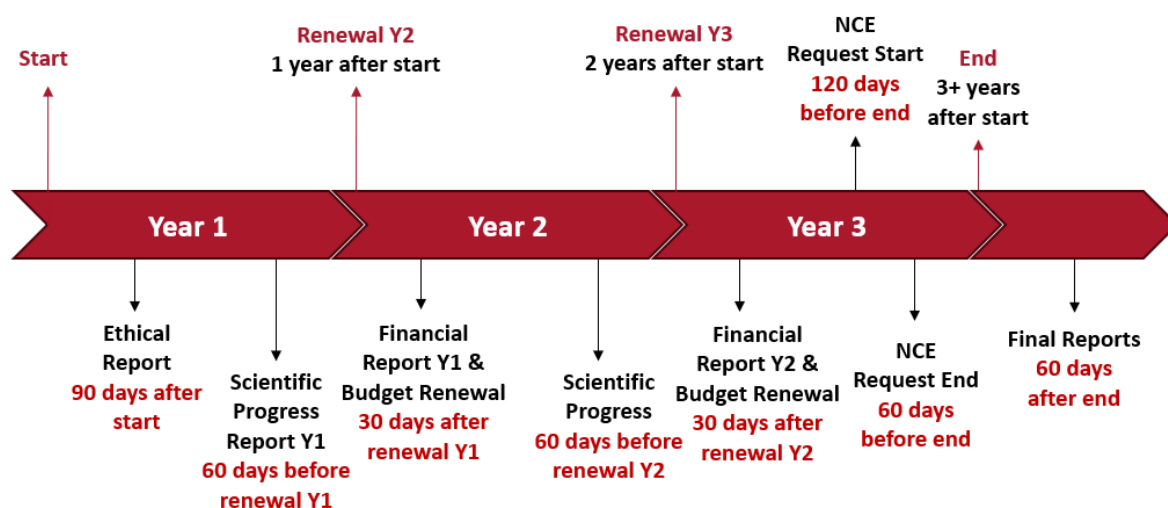
American Diabetes Association Research Portal

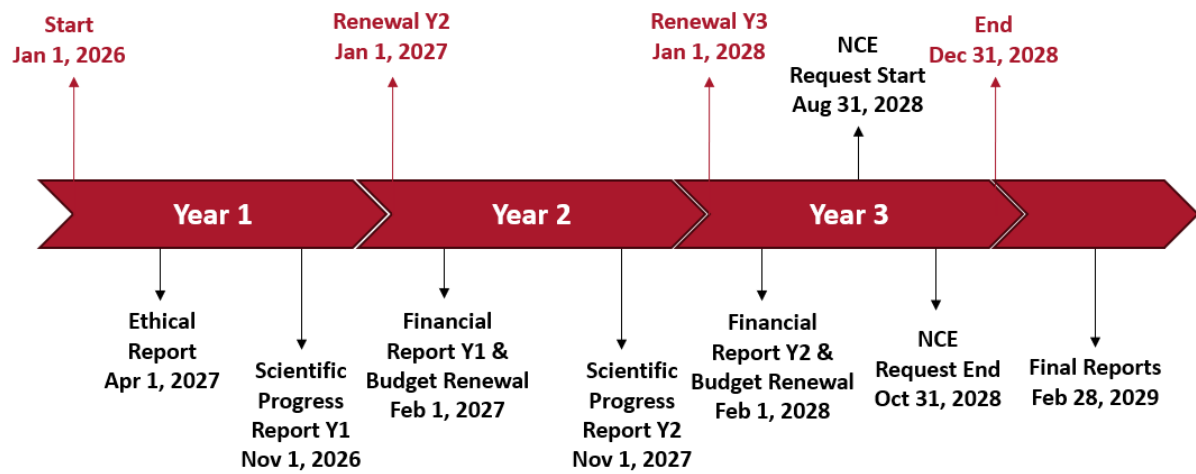
Activities

1-12 of 12

	#	Grant ID	Project Title	Activity Type	Status	Due Date
Open	1	7-25-ICTSAD-0394	test that works	Final Financial Report	Revisions Requested	09/13/2025
Open	2	7-25-IBSAD-1568	this is a test application for Angel	Amendment - Institutional Transfer	Draft	
Open	3	7-25-ICTSAD-0394	test that works	Amendment - No Cost Extension	Draft	
Open	4	7-25-ICTSAD-0394	test that works	Amendment - Award Relinquishment	Draft	
Open	5	7-25-ICTSAD-0394	test that works	Budget Renewal	Draft	
Open	6	7-25-ICTSAD-0394	test that works	Budget Renewal	Draft	

- Requirements follow a scheduled timeline based on your start date
 - Sample reporting timelines





Completing the Different SmartSimple Requirements

1. **Annual Scientific Progress Reports:** document the scientific achievements and progress made throughout the grant year
 - Summary of accomplishments: you will need to provide a detailed scientific and lay summary of your accomplishments from that year along with note any setbacks encountered, and outline planned objectives for the upcoming year
 - Other sources of support: if you hold grants other than your ADA grant, you will need to fill out this part of the report and provide full transparency on your percent effort and other projects. You must utilize our [template](#)
 - Presentations, Patents, Career: if you presented your research, applied for any patents, or experienced any career updates, you need to include it in these sections. If you do not have anything to share in any of these categories, you may write “N/A.”
 - Reports are due **60 days before the award renewal date**, and open 30 days before their due date
 - Some external forms may be required, such as in the other sources of support, which can be found [here](#), under “Reporting Requirements”
 - Patents need to be reported through completing an IP Report (see below)
 - Select “Save Draft: at the bottom to save progress as you complete the form
 - Select the “Submit” button at the bottom of the page to submit your report for review
 - If ADA staff reviewing your Scientific Progress Report discover any issues or require edits, you will receive an email with comments requesting revisions. When you enter your SmartSimple activities tab on your dashboard, your report will be there with the status “Revisions Requested” for you to reenter
 - Hard copies and forms submitted via email will not be accepted

7-25-ICTSAD-0394 - Annual Scientific Progress Report

*** Scientific Accomplishments**

We kindly request that you provide a comprehensive report detailing the accomplishments achieved during the current grant year. This report should be typed, double-spaced, and should not exceed four pages, including any figures. Your detailed account of the progress and outcomes will greatly assist us in evaluating the impact and success of the funded project.

Template available for download below:

[Download](#)

Drop files here or [browse files](#)
Maximum file size: 2 GB

*** Lay Summary - Accomplishments**

Please provide a summary of the results of your work during the current year of funding. This description should be around 250 words and written in a way that is easily understandable by the general public. This summary may be used for external communications so please do not include any confidential information.

250 words left

[Save Draft](#) [Submit](#)

2. Annual Financial Reports: you are required to provide a detailed financial report listing your expenses for the year including a budget form for the expense reporting and a Justification section

- Reports are due **30 days** after the award renewal date, and open 30 days before their due date
- To complete the expenditure report portion of the financial report, select the “Open Budget Reporting” button

7-25-IBSAD-1568 - Annual Financial Report

Preview Budget: [\\$ Preview Budget](#)

* Reporting Year: 1

* Active budget for this activity: 7-25-IBSAD-1568 - Application Budget

Budget Reporting Instructions

Please open the Budget Reporting section and fill in the actual costs for each budget item. After completion, submit the report by clicking the “Submit” button below.

Budget Reporting: [Open Budget Reporting](#)

*** Justification of Expenses**

The Justification of Expenses should include a breakdown of the submitted expenditure report in a narrative format, using everyday language, explaining the items needed to accomplish the scope of work. If carry forward is requested, the Justification of Expenses should include why the funds were not spent as planned and the need and purpose of using the unspent funds in the next grant year.

[Save Draft](#) [Submit](#)

- Selecting the button will open a pop-up form
- The form reflects the amounts and information from your original budget (the gray, un-editable boxes) and provides a space to fill in how much was actually spent per category (the highlighted orange boxes labeled “Actual —”)

- Fill in your actual expenses in the orange boxes and select “Save” to save your progress
- Expenses will be automatically calculated by the form when filled in, and rows cannot be removed or added
- If you need a row to be added to your financial report, contact grantadministration@diabetes.org
- If any of your expenses cause a change of 25% or greater in any category, you will need a budget revision; contact grantadministration@diabetes.org to request a budget revision
- Upon completing and approval of your revision, you can continue your financial report

Budget Reporting

Period 1
Period 2
Period 3
Summary

Collapse All
Save

General Instruction

Applicants may request up to three (3) years of funding support. The proposed project budget should not exceed \$115,000 USD per year (including 10% indirect costs) for a maximum total budget up to \$345,000 USD over three (3) years.

Personnel Instruction

Personnel salaries and wages include wages earned by an employee and may include fringe benefits. All personnel listed in the grant (including all key personnel) must be included in the budget (names, credentials, position, percent effort) and in the personnel justification. If a position is currently vacant, list it as TBD. If the Principal Investigator or key personnel are not taking a salary from the grant, then their base salary is \$0.00 but a percent effort and justification must still be provided. The percent effort listed in the justification should match the percent effort in the line item budget. Finally, confirm that all salaries requested are for personnel at the grantee institution. **For Innovative Basic Science awards, support for the Principal Investigator's salary, including fringe benefits, cannot exceed 20% of total costs per year.

Personnel

Justification	Title	Person Name	% Effort	Salary	Fringe Benefits	Cost
ljf	slkg	alsdf	50.00%	\$85,000.00	\$10,000.00	\$52,500.00
jkfjashf	sanfasdfishf	lsnfasnfkadalfkn	15.00%	\$50,000.00	\$5,000.00	\$12,500.00

Justification	Title	Person Name	Actual % Effort	Actual Salary	Actual Fringe Benefits	Actual Cost	Variance
ljf	slkg	alsdf	50.00%	\$85,000.00	\$10,000.00	\$52,500.00	\$0.00
jkfjashf	sanfasdfishf	lsnfasnfkadalfkn	15.00%	\$50,000.00	\$5,000.00	\$12,500.00	\$0.00

- In the Justification section on your report, please include a detailed description of the expenses in your expenditure report section
- Include information such as how your funds have been utilized, address any increases or decreases in different line items, and any unexpended funds (carryforward)
- If you have any unexpended funds that you need to carryforward, you need to request to carryforward the funds in the Justification section by: stating the amount being carried forward, explain why the funds were not utilized during that year, explain how they will be used in the following year
- Upon completing all sections of the financial report, select “Save Draft” and then the “Submit” button at the bottom of the page

- Note: if your financial report is approved by the ADA, your carryforward is approved as well

* Justification of Expenses

The Justification of Expenses should include a breakdown of the submitted expenditure report in a narrative format, using everyday language, explaining the items needed to accomplish the scope of work. If carry forward is requested, the Justification of Expenses should include why the funds were not spent as planned and the need and purpose of using the unspent funds in the next grant year.

Save Draft Submit

3. Final Financial and Scientific Reports

- Final Financial Reports and Final Scientific Progress Reports follow the same format as the Annual Financial and Scientific Reports
- The same procedures and requirements from the Annual Financial Report and Annual Scientific Progress Report should be applied
- Reports are due **60 days** after the award end date, and open 30 days before their due date
- Final Financial Reports should include the full name of all personnel, not only their title (e.g. Research Assistant)
- Note: If your Final Financial Report indicates an unexpended balance of **\$25 or more**, a refund to the ADA is required. Please notify your financial officer of any remaining funds and remit payment by check to the ADA at the address listed below. Be sure to include your ADA award ID in the accompanying correspondence.

American Diabetes Association
ATTN: Research Programs
P.O. Box 7023
Merrifield, VA 22116-7023

4. Budget Renewals: provide an opportunity to review and edit your budget for the upcoming funding year

- Renewals are due **30 days** after the renewal date, and open 30 days before their due date
- Changes that are greater than 25% in a given category can be done without the need for a Budget Revision
- The total budget for the year may not be increased or decreased; funds may only be reallocated among existing budget categories

- Note: if you have no budget updates, you may Submit your renewal without making any changes in the Budget Modification
- To make updates to your upcoming year's budget, select the "Open Budget Modification" button

7-25-IBSAD-1568 - Budget Renewal

* Status: Scheduled

* Owner: Grant Administration Test Test

* Scheduled Date: 03/23/2026

* Due Date: 03/27/2026

Preview Budget: [\\$ Preview Budget](#)

* Active budget for this activity: 7-25-IBSAD-1568 - Application Budget

* Budget Year to Modify: [Open Budget Modification](#)

[Save Draft](#) [Submit](#)

- Selecting the button will open a pop-up form
- The form reflects the amounts and information from your original budget (the gray, un-editable boxes) and provides a space to fill in how much you anticipate spending per category (the white boxes labeled "Modified ____")
- Fill in your anticipated expenses in the white boxes and select "Save" to save your progress
- Expenses will be automatically calculated by the form when filled in. Note that rows can be added, however, rows cannot be removed

Budget Modification

key personnel are not taking a salary from the grant, then their base salary is \$0.00 but a percent effort and justification must still be provided. The percent effort listed in the justification should match the percent effort in the line item budget. Finally, confirm that all salaries requested are for personnel at the grantee institution. **For Innovative Basic Science awards, support for the Principal Investigator's salary, including fringe benefits, cannot exceed 20% of total costs per year.

Personnel

Justification	Title	Person Name	% Effort	Salary	Fringe Benefits	Cost
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jkfjashf	sanfasdfishf	lsnfasnflksdalfkn	15.00%	\$50,000.00	\$5,000.00	\$12,500.00

Justification	Title	Person Name	Modified % Effort	Modified Salary	Modified Fringe Benefits	Modified Cost	Variance
ljf	slkg	alsdf	50.00%	\$85,000.00	\$10,000.00	\$52,500.00	\$0.00
jkfjashf	sanfasdfishf	lsnfasnflksdalfkn	15.00%	\$50,000.00	\$5,000.00	\$12,500.00	\$0.00

[Add Personnel](#)

Personnel Subtotal: \$65,000.00 \$65,000.00 \$0.00

- Upon completing the Budget Renewal, select “Save Draft” and then the “Submit” button at the bottom of the page

7-25-IBSAD-1568 - Budget Renewal

* Status: Scheduled

* Owner: Grant Administration Test Test

* Scheduled Date: 03/23/2026

* Due Date: 03/27/2026

Preview Budget: [\\$ Preview Budget](#)

* Active budget for this activity: 7-25-IBSAD-1568 - Application Budget

* Budget Year to Modify: 2

[Open Budget Modification](#)

[Save Draft](#) [Submit](#)

5. **Budget Revisions:** To modify an approved project budget year with changes of 25% or greater, such as reallocating funds among cost categories, or adjusting the budget to address evolving project needs, financial considerations, or changes in project direction.

- Requests for Budget Revisions can be made by emailing grantadministration@diabetes.org anytime during the span of the grant
- In your email include a brief description of your request and the year you need to make your revisions so an ADA grant administrator can open a budget revision requirement in your SmartSimple account
- The total budget for the year may not be increased or decreased; funds may only be reallocated among existing budget categories
- Budget Revisions consist of two parts: the budget modification and a justification section
- To make updates to your upcoming year’s budget, select the “Open Budget Modification” button

7-25-IBSAD-1568 - Budget Revision

* Status: Scheduled

* Owner: Grant Administration Test Test

* Due Date: 03/01/2047

Preview Budget: [\\$ Preview Budget](#)

* Active budget for this activity: 7-25-IBSAD-1568 - Application Budget

* Budget Year to Modify: 3

[Open Budget Modification](#)

Application Details

[Save Draft](#) [Submit](#)

- Selecting the button will open a pop-up form

Budget Modification

key personnel are not taking a salary from the grant, then their base salary is \$0.00 but a percent effort and justification must still be provided. The percent effort listed in the justification should match the percent effort in the line item budget. Finally, confirm that all salaries requested are for personnel at the grantee institution. **For Innovative Basic Science awards, support for the Principal Investigator's salary, including fringe benefits, cannot exceed 20% of total costs per year.

Personnel

Justification	Title	Person Name	% Effort	Salary	Fringe Benefits	Cost
ljf	slkg	alsdf	50.00%	\$85,000.00	\$10,000.00	\$52,500.00
jkfjashf	sanfasdfshf	lsnfasnflksdalfkn	15.00%	\$50,000.00	\$5,000.00	\$12,500.00

Justification	Title	Person Name	Modified % Effort	Modified Salary	Modified Fringe Benefits	Modified Cost	Variance
ljf	slkg	alsdf	50.00%	\$85,000.00	\$10,000.00	\$52,500.00	\$0.00
jkfjashf	sanfasdfshf	lsnfasnflksdalfkn	15.00%	\$50,000.00	\$5,000.00	\$12,500.00	\$0.00

[Add Personnel](#)

Personnel Subtotal: \$65,000.00 \$65,000.00 \$0.00

- The form reflects the amounts and information from your original budget (the gray, un-editable boxes) and provides a space to make the necessary adjustments per category (the white boxes labeled “Modified ____”)
- Expenses will be automatically calculated by the form when filled in, and rows cannot be removed, but can be added
- Fill in your revised expenses in the white boxes and select “Save” to save your progress

7-25-IBSAD-1568 - Budget Revision

BUDGET REVISION

Budget Revision

Any budget reallocations exceeding 25% in any category require prior approval from Association staff. The total project budget will not be increased beyond the original terms under any circumstances. The grantee must obtain written authorization from the Association before making any changes to the budget categories. The Association reserves the right to impose a penalty or withhold the next payment until the issue is resolved for any budget revisions over 25% made without prior approval.

*** Reallocation Justification**

Please describe the reasons for the budget reallocation and explain how it will support the advancement of your research.

Save Draft Submit

- In the Justification portion of your revision, please include a detailed description of the changes you are making, the reasons you are making them, and how they will further your research
 - Upload the requested documentation, including an official letter or document with your Budget Revision request under the “Reallocation Justification Uploads” section and any additional documents under “Upload Budget Revision Request”
 - Upon completing all sections of the Budget Revision, select “Save Draft” and then the “Submit” button at the bottom of the page
 - Note: Annual Financial Reports are for reporting expenses for your current grant year; Budget Renewals are for adjusting your upcoming grant year budget at the time of your renewal date; Budget Revisions are for adjusting your current or future grant year budgets at any time during the grant
6. **No-Cost Extensions:** Upon request, grantees may be granted a no-cost extension to complete outstanding project-related activities. A maximum of one extension may be approved, for a period ranging from six months to one year
- NCEs can only be requested **60-120 days** before the grant’s end date
 - **If you request an NCE after this time frame, it will not be considered**
 - To request an NCE, email grantadministration@diabetes.org and include your grant ID and a brief description for your need of an NCE
 - No additional funding is provided from the ADA during NCEs
 - Any remaining funds can be carried forward and utilized during the NCE period

- NCE requests in SmartSimple require a financial and scientific progress report so ADA staff can view the progress at the time of the NCE and an estimation of the amount of remaining funds that need to be carried forward

American Diabetes Association Research Portal

7-25-IBSAD-1568 - Amendment

* Current Grant Year
-- Select One --

* New Requested End Date
mm/dd/yyyy

* Estimated Award Budget Remaining

* Upload Financial Report
Access the financial report template here:
Download

JUMP TO
Amendment Details
No Cost Extension Request

Save Draft Submit

- Includes a Justification section in which you should provide a detailed explanation of your need for an NCE and what you plan to complete during that period
- Upon completing all sections of the No Cost Extension, select “Save Draft” and then the “Submit” button at the bottom of the page

American Diabetes Association Research Portal

7-25-IBSAD-1568 - Amendment

Upload Progress Report
Access the scientific progress report template here:
Download

Drop files here or [browse files](#)
Maximum file size: 10 MB

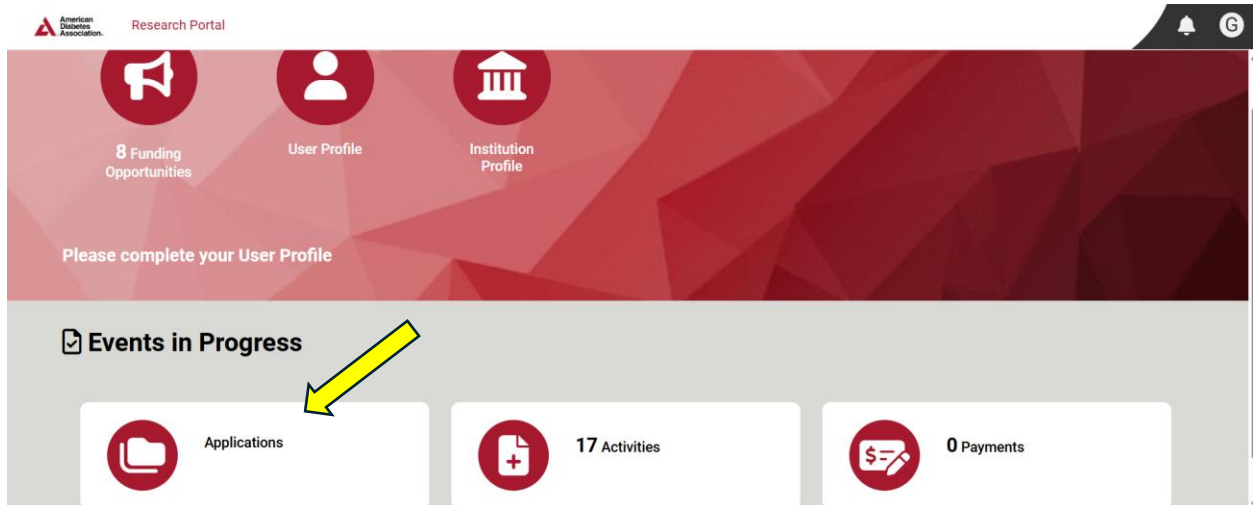
* No Cost Extension Justification

Save Draft Submit

7. Ethical Reports: Up to date IACUC/IRB approval documentation is required

- These can be completed at any time during the grant and do not require an ADA administrator to assist

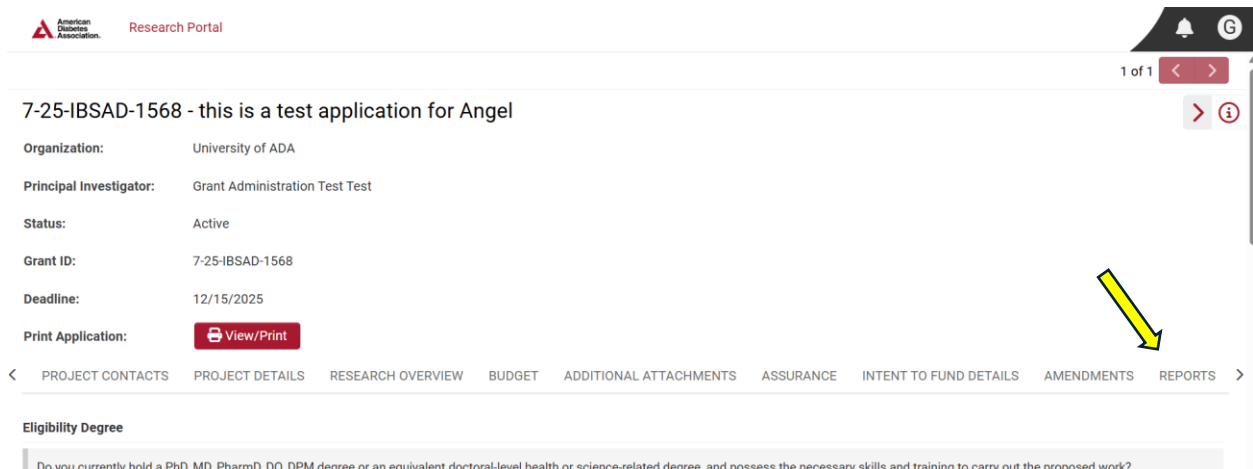
- Your first Ethical Report is due **90 days** after your start date, after the first one they can be uploaded as needed throughout the grant
- Navigate to your grant through selecting the “Applications” icon on your dashboard



- Navigate to the “Active” tab and select the “Open” button to enter your grant



- Upon entering your grant, navigate to the “Reports” tab and scroll to the bottom of the tab



- At the bottom of the page, select the button titled “Create Ethical Report” next to the Ethical Report label to open a report

Test-2421 - test 2

PROJECT CONTACTS PROJECT DETAILS RESEARCH OVERVIEW BUDGET ADDITIONAL ATTACHMENTS ASSURANCE INTENT TO FUND DETAILS AMENDMENTS **REPORTS**

Ethical Reports

0 of 0

#	Grant ID	Activity Type	Owner	Status	Due Date	Created Date
No Results Found						

IP Report: [Create IP Report](#)

Ethical Report: [Create Ethical Report](#)

< BACK

JUMP TO

- Scheduled Reports
- Ad Hoc Reports

- Select “Schedule” to continue to the ethical report

New Activity

* Status: Draft

[Schedule](#)

- Follow the instructions to complete the report and upload your relevant documents
- Upon completing the necessary sections of the Ethical Report, select “Save Draft” and then the “Submit” button at the bottom of the page

7-25-IBSAD-1568 - Ethical Report

* Ethical Approval

Does this project require Institutional Review Board (IRB) or Institutional Animal Care and Use Committee (IACUC) ethical approval?

-- Select One --

Vertebrate Animal Research (IACUC)

Have you already received IACUC approval?

--Select One--

Study Number

What is the study number for the approved or pending IACUC? (if available)

IACUC Start Date

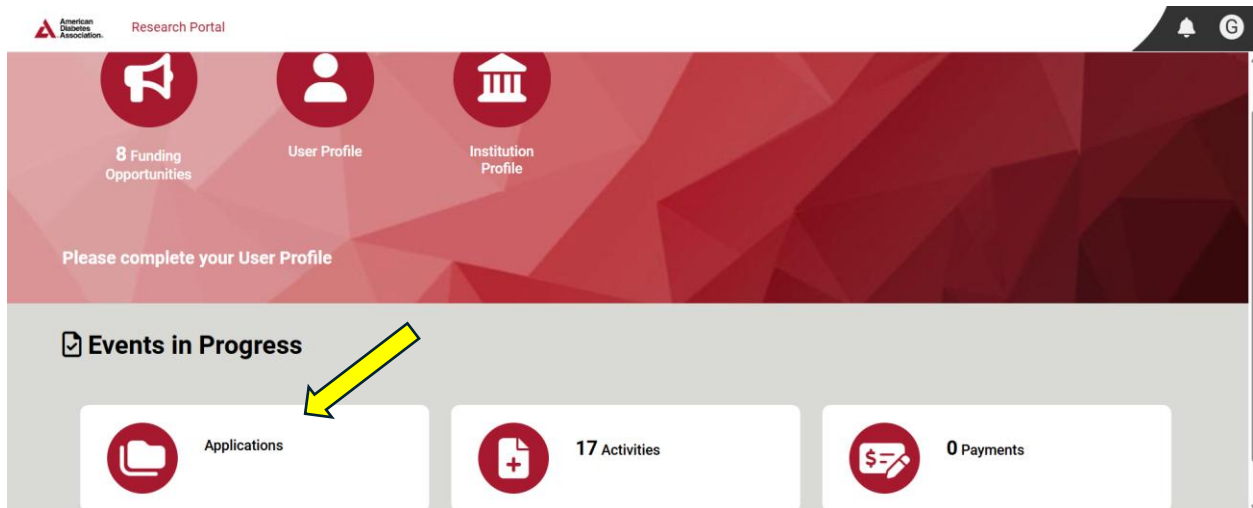
[Save Draft](#) [Submit](#)

JUMP TO

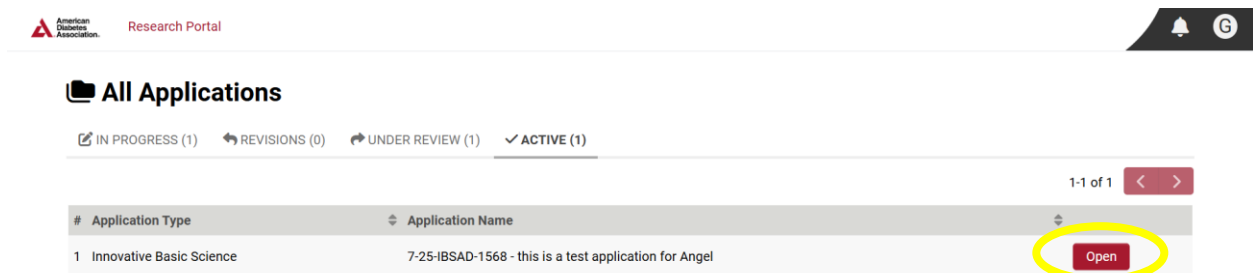
- Ethical Certifications

8. IP Reports: completed when there is an approved patent for work connected to the ADA funded grant

- These can be completed at any time during the grant and do not require an ADA administrator to assist
- Navigate to your grant through selecting the “Applications” icon on your dashboard



- Navigate to the “Active” tab and select the “Open” button to enter your grant



- Upon entering your grant, navigate to the “Reports” tab and scroll to the bottom of the tab

American Diabetes Association Research Portal

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7-25-IBSAD-1568 - this is a test application for Angel > i

Organization: University of ADA

Principal Investigator: Grant Administration Test Test

Status: Active

Grant ID: 7-25-IBSAD-1568

Deadline: 12/15/2025

Print Application: [View/Print](#)

< PROJECT CONTACTS PROJECT DETAILS RESEARCH OVERVIEW BUDGET ADDITIONAL ATTACHMENTS ASSURANCE INTENT TO FUND DETAILS AMENDMENTS **REPORTS** >

Eligibility Degree

Do you currently hold a PhD, MD, PharmD, DO, DPM degree or an equivalent doctoral-level health or science-related degree, and possess the necessary skills and training to carry out the proposed work?

- At the bottom of the page, select the button titled “Create IP Report” next to the IP Report label to open a report

American Diabetes Association Research Portal

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7-25-IBSAD-1568 - this is a test application for Angel > i

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Ethical Reports

1-1 of 1 < >

#	Grant ID	Activity Type	Owner	Status	Created Date	Last Modified
1	7-25-IBSAD-1568	Ethical Report	Grant Administration Test Test	Completed	02/19/2026 04:31PM	03/16/2026 01:04PM

JUMP TO

- Scheduled Reports
- Ad Hoc Reports

IP Report: [Create IP Report](#)

Ethical Report: [Create Ethical Report](#)

< BACK

- Select “Schedule” to continue to the ethical report

American Diabetes Association Research Portal

New Activity > i

* Status: Draft

[Schedule](#)

- Follow the instructions to complete the report and upload your relevant documents
- Upon completing the necessary sections of the IP Report, select “Save Draft” and then the “Submit” button at the bottom of the page

American Diabetes Association Research Portal

Test-2421 - IP Report

- All inventions made with the support, in whole or in part, of American Diabetes Association research grant funds must be reported in a timely fashion to the Association.
- When initially contacting the Association with notice of your invention or discovery, please fill out the required form below to ensure smooth tracking of your patent.
- The Association understands the confidential nature of your work and will keep all submitted documentation confidential.
- Materials associated with Intellectual Property, Invention Reporting, & Royalties for any closed grants should be emailed to grantadministration@diabetes.org.

*** IP Reporting**

Have you applied for or received any patents this year for work funded by the current ADA award?

-- Select One --

*** Number of Patents Received**

How many patents have you received from the work funded by your current ADA award?

Save Draft Submit

JUMP TO

- Intellectual Property**
 - Patent Disclosure
 - Patent Materials

9. Relinquishments: special requirement that is initiated when a grant needs to be relinquished

- Relinquishments are required for various reasons, most commonly the acceptance of another grant that conflicts with an ADA grant, inability to fulfill ADA regulations or inability to keep the grant after an institutional transfer
- If a relinquishment may be applicable to your situation, please contact grantadministration@diabetes.org to inquire more details
- In your email provide a description of your situation and estimated relinquishment date so an ADA administrator can open a requirement in SmartSimple
- The requirement requires a specific Relinquishment Date (similar to your end date), a formal relinquishment letter, accurate amounts of unexpended funds, and an authorized signature from the PI or an institutional signing official
- Ensure your relinquishment letter provides a detailed description of the need for relinquishment and acknowledgment from all relevant parties at your institution
- Follow the instructions in SmartSimple to complete the requirement
- Upon completing the necessary sections of the Relinquishment amendment, select “Save Draft” and then the “Submit” button at the bottom of the page

7-25-IBSAD-1568 - Amendment



▼ Institutional Transfer

* Relinquishment Date

mm/dd/yyyy

* Institution Transfer

Has the Principal Investigator indicated an interest in continuing their research project at a different institution?

--Select One--

* Current Grant Year

Is your award in the last year?

--Select One--



JUMP TO

Amendment Details

Institutional Transfer

New Grantee Institution

Contact Information

Save Draft

→ Submit

Frequently Asked Questions

1. How do I add Finance or Research Officers? How do I give someone access to my grant?

To view what contacts and officers are currently attached to your grant, navigate to the “Project Contacts” tab on your grant. Scroll to the bottom to see the list of who is attached to your grant. Please note that you should only have one Finance Officer and one Research Officer.

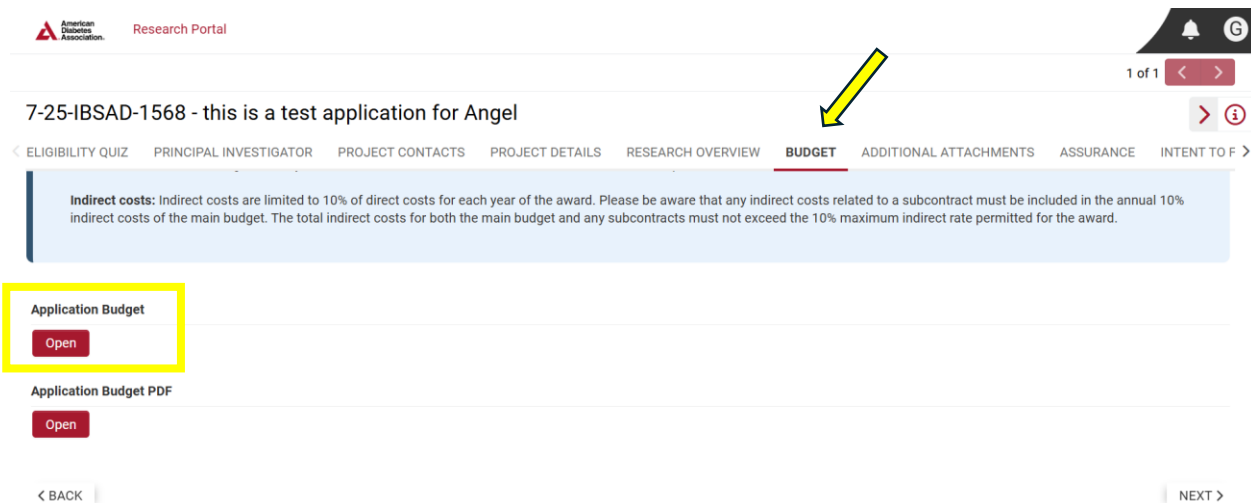
If you want to change any of your project contacts, please email grantadministration@diabetes.org with your grant ID, the contact type you want to update, and your contact’s name and email.

The screenshot shows the American Diabetes Association Research Portal interface. The top navigation bar includes the ADA logo and the text "Research Portal". Below this, the grant ID "7-25-IBSAD-1568 - this is a test application for Angel" is displayed. A yellow arrow points to the "PROJECT CONTACTS" tab in the navigation menu. Below the navigation menu, a blue banner states: "not have access to view or edit the proposal. For a full proposal application, please upload a biosketch for any faculty-level collaborators listed as key personnel in the 'Additional Attachments' section". A yellow box highlights a table of project contacts. The table has columns for #, Full Name, Institution, Email, and Role. The table lists three contacts: 1. ADAResearchPrograms Mailbox (University of ADA, Finance Officer), 2. Grant Administration Test Test (University of ADA, Principal Investigator), and 3. Jami Goodman - RO (University of ADA, Research Officer). The email column for all contacts is redacted with a blue box. To the right of the table, there is a "JUMP TO" section with links for "Collaborators" and "Project Contacts". At the bottom of the page, there are "BACK" and "NEXT" buttons.

#	Full Name	Institution	Email	Role
1	ADAResearchPrograms Mailbox	University of ADA		Finance Officer
2	Grant Administration Test Test	University of ADA		Principal Investigator
3	Jami Goodman - RO	University of ADA		Research Officer

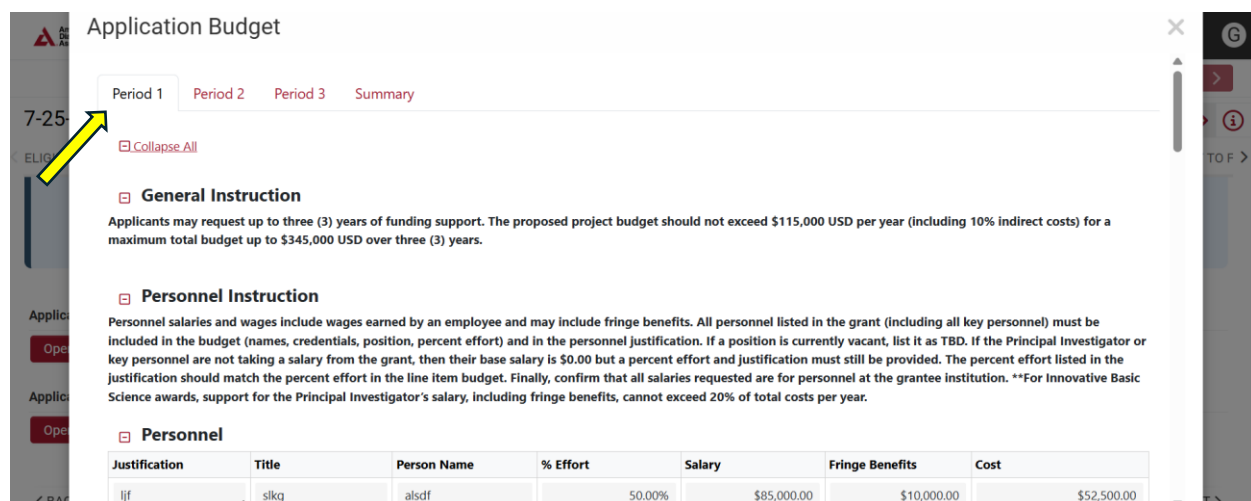
2. How can I view my current budget? How do I edit it?

To view your budget, navigate to your grant and select the tab labeled “Budget.” Scroll down until you find a button under the label “Application Budget.” Select Open and a pop-up screen will open with your budget.



The pop-up screen will display your full budget. Select the different tabs (each “period” corresponds to a given year) to review your budget. If there is anything in your budget you want to change, you can take one of the following steps:

- I. Changes less than 25% in a category: small changes like these can be reported in Annual Financial Reports, or made during the Budget Renewal period, do not need to have separate requests for them
- II. Add/remove line items: line items cannot be removed, but the designated funds can be changed to zero, and line items can be added during Budget Renewals, Budget Revisions, or upon request to grantadministration@diabetes.org
- III. Changes greater than 25% in a category: changes can be made during the Budget Renewal period, or upon request for a Budget Revision by contacting grantadministration@diabetes.org



3. How can I find my current or past NCEs, Institutional Transfers or Relinquishment requirements?

If you want to view any active or past NCEs, Institutional Transfers, or Relinquishments, navigate to the “Amendments” tab on your grant. The amendments are all listed and can be selected and completed or viewed.

American Diabetes Association Research Portal

7-25-IBSAD-1568 - this is a test application for Angel

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PROJECT CONTACTS PROJECT DETAILS RESEARCH OVERVIEW BUDGET ADDITIONAL ATTACHMENTS ASSURANCE INTENT TO FUND DETAILS **AMENDMENTS** REPORTS

Amendments

#	Grant ID	Subject	Amendment Type	Owner	Created Date	Last Modified	Status
1	7-25-IBSAD-1568	7-25-IBSAD-1568 - Amendment	Award Relinquishment	Grant Administration Test Test	03/27/2026 10:58AM	03/27/2026 10:58AM	Draft
2	7-25-IBSAD-1568	7-25-IBSAD-1568 - Amendment	No Cost Extension	Grant Administration Test Test	03/25/2026 12:12PM	03/25/2026 12:12PM	Draft
3	7-25-IBSAD-1568	7-25-IBSAD-1568 - Amendment	Institutional Transfer	Grant Administration Test Test	02/19/2026 11:25AM	02/19/2026 11:25AM	Draft

< BACK NEXT >

4. How can I download a copy of my full application?

If you want to download a copy of your grant and application, first access your grant. At the top of your grant when you first enter it, there is a button labeled “Print/View” next to the label Print Application. Select this button. After selecting the button, a pop up window will open.

American Diabetes Association Research Portal

7-25-IBSAD-1568 - this is a test application for Angel

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Organization: University of ADA

Principal Investigator: Grant Administration Test Test

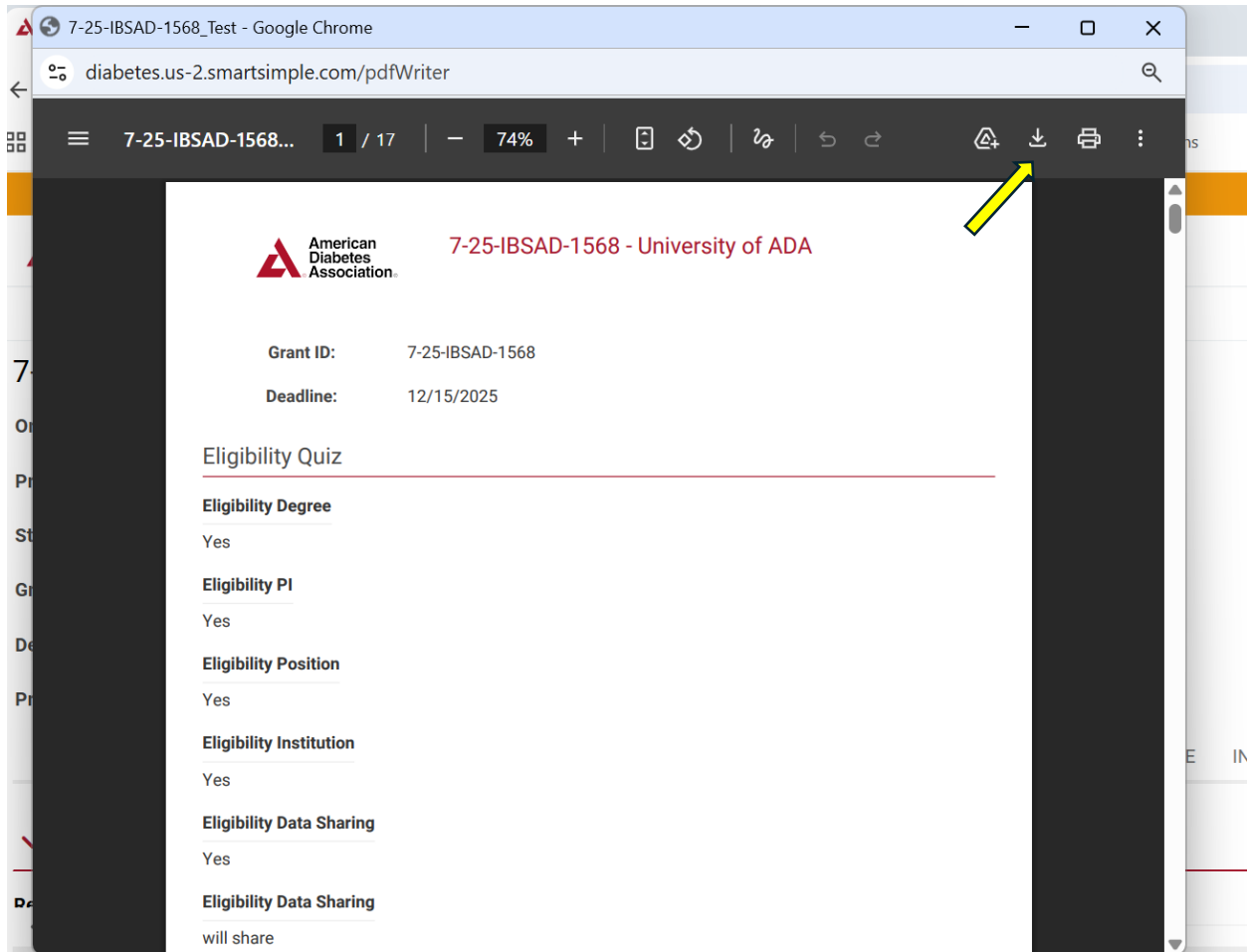
Status: Active

Grant ID: 7-25-IBSAD-1568

Deadline: 03/15/2025

Print Application: **View/Print**

The pop-up window displays a PDF copy of your grant that combined all the information listed in the different tabs of your grant. It reports both the questions and answers and can be downloaded as a PDF or any other desired document for your records.



5. How can I find my current or past reports?

If you want to view any active or past Financial, Scientific or Ethical reports, navigate to the “Reports” tab on your grant. The reports are all listed and can be selected and completed or viewed.

7-25-IBSAD-1568 - this is a test application for Angel
Print Application: [View/Print](#)

[PROJECT CONTACTS](#)
[PROJECT DETAILS](#)
[RESEARCH OVERVIEW](#)
[BUDGET](#)
[ADDITIONAL ATTACHMENTS](#)
[ASSURANCE](#)
[INTENT TO FUND DETAILS](#)
[AMENDMENTS](#)
[REPORTS](#)

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JUMP TO

Scheduled Reports

Ad Hoc Reports

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#	Grant ID	Activity Type	Owner	Status	Created Date	Last Modified
1	7-25-IBSAD-1568	Annual Scientific Progress Report	Grant Administration Test Test	Scheduled	03/17/2026 02:21PM	03/17/2026 02:21PM
2	7-25-IBSAD-1568	Annual Financial Report	Grant Administration Test Test	Scheduled	03/17/2026 03:47PM	03/17/2026 03:47PM

[BACK](#)

6. How can I download my reports?

To download your reports, first navigate to the “Reports” tab and view your list of reports. Currently, only Financial Reports can be downloaded when completed, Scientific Progress Reports cannot be downloaded. Select the financial report you want to download. The report will pop-up in a smaller window.

7-25-IBSAD-1568 - this is a test application for Angel
Print Application: [View/Print](#)

[PROJECT CONTACTS](#)
[PROJECT DETAILS](#)
[RESEARCH OVERVIEW](#)
[BUDGET](#)
[ADDITIONAL ATTACHMENTS](#)
[ASSURANCE](#)
[INTENT TO FUND DETAILS](#)
[AMENDMENTS](#)
[REPORTS](#)

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JUMP TO

Scheduled Reports

Ad Hoc Reports

1-2 of 2

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#	Grant ID	Activity Type	Owner	Status	Created Date	Last Modified
1	7-25-IBSAD-1568	Annual Scientific Progress Report	Grant Administration Test Test	Completed	03/17/2026 02:21PM	03/27/2026 12:47PM
2	7-25-IBSAD-1568	Annual Financial Report	Grant Administration Test Test	Completed	03/17/2026 03:47PM	03/27/2026 12:47PM

[BACK](#)

7-25-IBSAD-1568 - Annual Financial Report

2 of 2
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Status:Completed

Owner:Grant Administration Test Test

Scheduled Date:02/02/2026

Due Date:03/02/2027

If this date is updated after the report is in scheduled status, please click on "Save Draft" and then reset the report reminders with the button below.

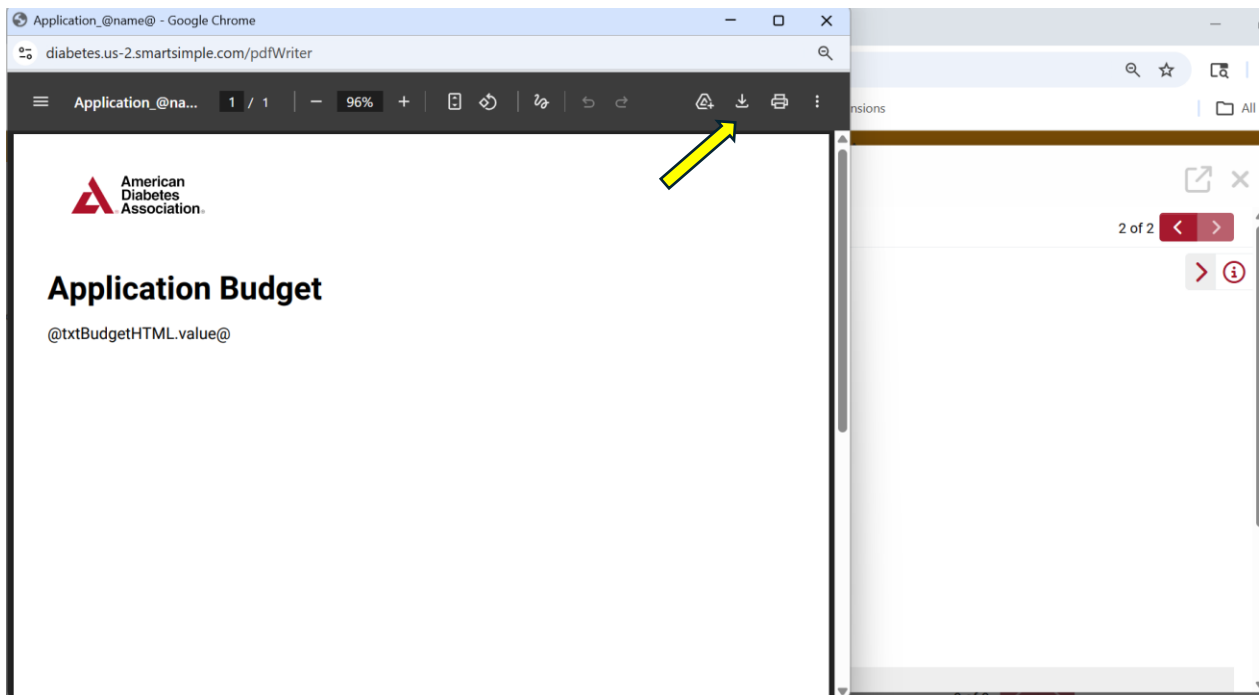
Preview Budget:

\$ Preview Budget

Reporting Year:1

Active budget for this activity:7-25-IBSAD-1568 - Application Budget

When you access the desired report, to download the financial portion, select the “Preview Budget” button near the top of the page. This will lead to a pop-up window that reflects the changes made during your financial report. (Note: the screenshot below does not accurately reflect what the window will look like as it is from a test grant, on your own grants the window will be populated with the information from your financial report). The report can then be downloaded as a PDF or any other desired document for your records.



7. How do I sign up for ACH?

To request electronic payments, email us with your request at grantadministration@diabetes.org with the name and email address of the financial representative responsible for ACH enrollment with our bank, Truist, and their managing partner, FIS (Fidelity National Information Services).

The bank will use the contact information provided to reach out and complete ACH enrollment. They will communicate using the email address fisip.payments@e.fisglobal.com.

If you have questions regarding electronic payments, reach out to us at grantadministration@diabetes.org

8. Where is my payment? Can you resend the check?

Quarterly award payments begin processing on the following dates:

February 15

May 15

August 15

November 15

Payments may take up to 90 days to process and be issued. Once a payment has been released, you will receive an email notification containing payment details, including the disbursement amount and mailing information. Please note that this notification confirms the payment has been sent, not received.

If you do not receive your payment within 90 days of the scheduled quarterly payment date, or within five weeks of receiving the email notification, please contact grantadministration@diabetes.org for assistance. Our team will be happy to work with you to review the status of your payment.

9. Can I take a leave of absence?

A leave of absence can be granted upon request. To execute a leave of absence, we will put your grant and its payments on hold until your return. If you are considering a leave of absence, please contact grantadministration@diabetes.org and provide a detailed explanation of your situation including the reason for your leave absence and the duration. More information can be found [here](#).

10. How do I sign up for membership? What if I don't receive my membership number before my Intent to Fund is due?

Refer to the [Membership](#) page for details on signing up. If you have not yet signed up or received your membership at the time of your Intent to Fund, you can temporarily fill in the membership question with zeros (0000). Later when you receive your membership, navigate to your User Profile (instructions mentioned above) to add it in.

11. What do I do if I have a patent?

If you have a patent during the time of your grant related to your ADA funded work, you need to submit an IP Report to the ADA. Instructions for submitting an IP Report can be found above. If you applied for or received a patent after the time of your grant, please complete the [Patent Disclosure Form](#) and submit it to grantadministration@diabetes.org.

12. What if I am listed under the wrong institution name?

Institutions typically have a legal name and an organization name. Multiple institutions can be listed under the same legal name but have different organization names. Organization names include the actual name of the institution, and do not include specific departments. Grantees should be listed under their organization name, and organization profiles should have the two names assigned accordingly in SmartSimple.

For example:

Legal Name: Regents of the University of ADA

Organization Name 1: University of ADA

Organization Name 2: University of ADA School of Medicine

Incorrect Organization Name: University of ADA Department of Biology

Incorrect Organization Name: Regents of the University of ADA

If you are listed under the wrong organization or the legal and organization names are switched, please notify us as soon as possible.

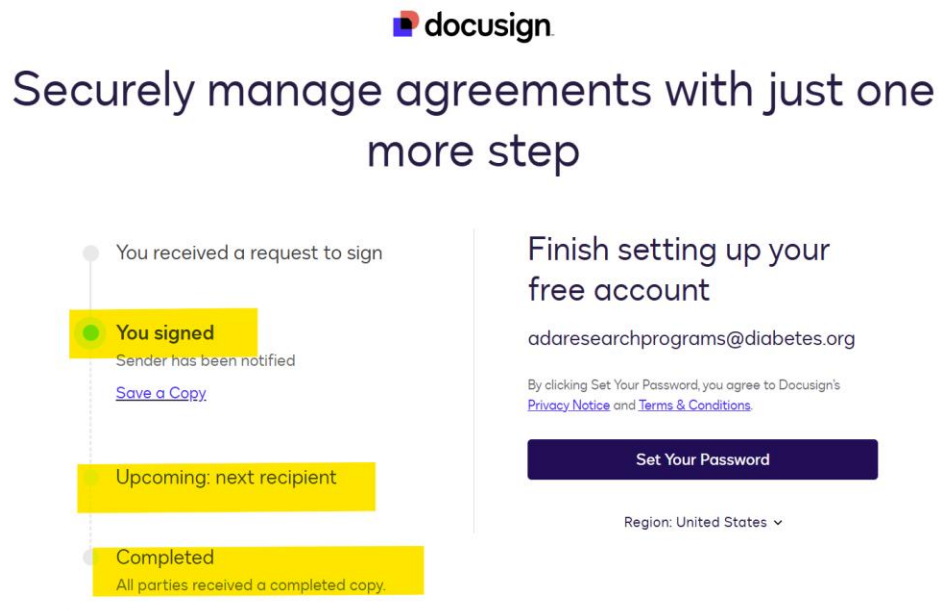
13. How to complete my Award Agreement with DocuSign?

The award agreement is first sent out to the PI via DocuSign. Once the PI signs the agreement, it automatically routes to the Research Officer listed on the award record. When the agreement is signed by both the PI and a representative of the institution, the signed agreement routes back to the ADA and an email with a copy of the signed agreement is sent to both the PI and the institution.

The Award Agreement to the PI is sent from: Grantadministration via DocuSign with a Subject Line: Signature required for Award Agreement for ADA

- Open the email and click on *Review Document*
- Read and agree to use electronic records and signatures
- Click Continue
- Read through the document and at the bottom, click on the blue *Sign* box, confirm your name and signature, then click on *Adopt and Sign*
- When done, click on the Finish Box on the upper right corner of the page. You can also click on the arrow to the right of the Finish box and choose *Print & Sign*

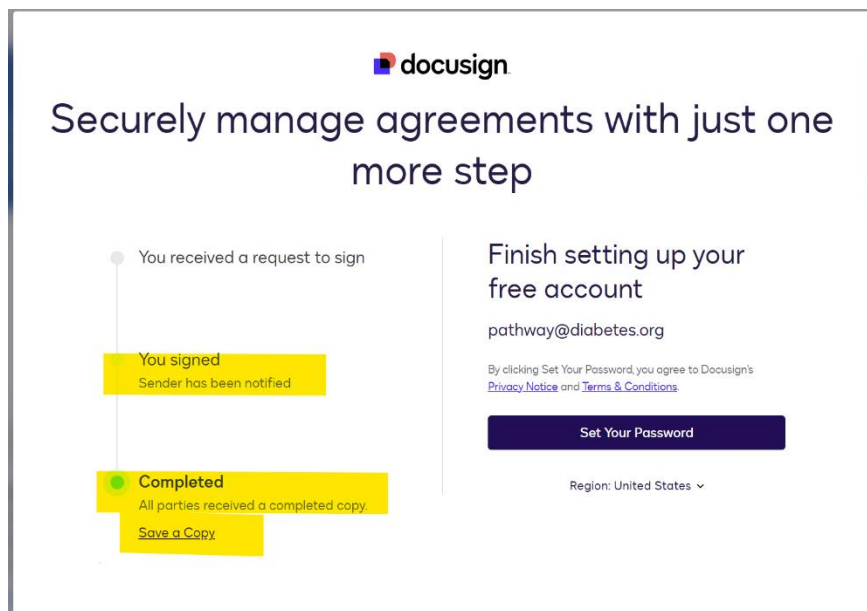
Once you have clicked on Finish, this box will come up:



- Close the window

The award agreement will now route to the Research Officer on file. They will complete the same process as listed above.

Once the Research Officer has finished signing, the box below will come up:



Shortly after, both the PI and the Research Officer will receive a fully completed copy of the award agreement. The email is sent from: *Grantadministration via Docusign* and the subject of the email will read as: *Completed: Signature required for Award Agreement for ADA*

14. How do I reassign the Docusign to someone else?

The agreement is automatically sent for signature to the Research Officer assigned to the grant. Currently, each award record is configured to allow access for one Research Officer only. For that reason, we are unable to change the signatory directly, however, the Research Officer may reassign the DocuSign to the appropriate signatory.

To reassign the signatory, please follow these instructions: open the email and click on *Review Document*. Once the document opens, click on the arrow to right of *Other Options* , then *Assign to Someone Else* and enter the new signer's details. See snip below for visual detail.

The screenshot shows a web form titled "Review and continue" with the American Diabetes Association logo. The form contains a message from grantadministration, instructions on how to activate the award by signing the Award Acceptance Form and the Stipulations Governing Research Grants and Intellectual Property Policy, and a link to the Electronic Record and Signature Disclosure. There is a checkbox for "I agree to use electronic records and signatures." and a language dropdown menu set to "English (US)". On the right side, there is a "Continue" button and an "Other Options" dropdown menu. The "Other Options" menu is open, showing options: "Finish Later", "Assign to Someone Else" (highlighted in yellow), "Decline to Sign", and "Session Information".

15. What if I need my agreement resent?

Once the agreement is initiated in the system, we are unable to view its status or stop the process until the award agreement is either returned to us or we initiate a resend of the DocuSign email.

If the agreement needs to be resent, please reach out to grantadministration@diabetes.org.

16. How do I save the completed agreement from DocuSign?

You are able to download and/or print a copy of the award agreement before or after you sign the agreement.

To download and/or print a copy of the award agreement, please follow these instructions:

- Open the email and click on *Review Document*.
- Read and agree to use electronic records and signatures
- Click *Continue*
- On the right side of the page, click *Download* or *Print*. See snip below for visual detail.

