

SmartSimple Account Registration: New Users

If this is your first time using the Boston Foundation's SmartSimple grants portal, please follow the steps below:

1. Go to the SmartSimple login page: <https://bostonfoundation.smartsimple.com>
2. Use the "Forgot Password?" link and input your email when prompted. If you already have an account in our system, you will receive an email at the address you provided with a link to reset your password. **Please try the password reset link even if you have never used our SmartSimple system before. If you are already in our database, then you likely already have an account.**
3. Once you receive the password reset email, click on the link to create a new password and log into the SmartSimple system. **You can access open funding opportunities under the icon "Funding Opportunities".**
4. If you do not receive an email after 10 minutes, then you may need to create a new account. Please follow the below steps. If you are blocked from creating a new account, please reach out to grantsinfo@tbf.org.

Creating a New Account in SmartSimple:

1. Click on the blue Register button underneath the login box.

The screenshot shows the SmartSimple login and registration interface for The Boston Foundation. On the left, there is a "Login" section with an "Email" input field, a "Password" input field with a search icon, a blue "Login" button, and a "Forgot Password?" link. Below the login fields is a section for "New to the System as a Grant Applicant?" with a "For Grant Applicants Only:" notice and a blue "Register" button. On the right, there is a "The Boston Foundation Portal" section with a welcome message and a list of user roles: Donor Advised Fund holders, Grant Applicants, and Grant Reviewers. Each role has a list of actions they can perform. At the bottom of the right section, there are contact instructions for each role, including email addresses and a phone number.

The Boston Foundation

Login

Email

Password

Login

[Forgot Password?](#)

New to the System as a Grant Applicant?

For Grant Applicants Only: If you do not receive an email using the password reset link above, you may be new to our database. Please click the "Grant Applicant Registration" button below to set up an account. Please reach out to grantsinfo@tbf.org if you need assistance.

Register

The Boston Foundation Portal

Welcome! In an effort to provide you with the best possible service, the Boston Foundation's online portal is customized specifically for fundholders, grant applicants, and grant reviewers. The portal provides streamlined experiences for:

- Donor Advised Fund holders to make grant recommendations, review pending grants, and access gift history, resources, and events
- Grant Applicants to apply for grants, review previously submitted applications, submit grant reports, and learn about upcoming offerings and opportunities
- Grant Reviewers to review applications and submit rubrics

If you are logging in for the first time or have forgotten your password, click the "Forgot Password?" link underneath the Login button and enter the email address associated with your portal account. If you do not receive an email with password reset instructions after 10 minutes, please reach out to one of the following contacts:

- Donor Advised Fund holders, please email donorservices@tbf.org or call 617-338-2213. If you have questions about establishing a fund or charitable fund options, please visit our website or email donorservices@tbf.org.
- Grant Applicants and Reviewers, please email grantsinfo@tbf.org.

2. Click on the appropriate box to indicate whether you are applying on behalf of an organization, or if you are applying as an individual or as part of a group of individuals. **Note – the only grant programs that accept individual applicants are Live Arts Boston and Next Steps.**



Registration Options

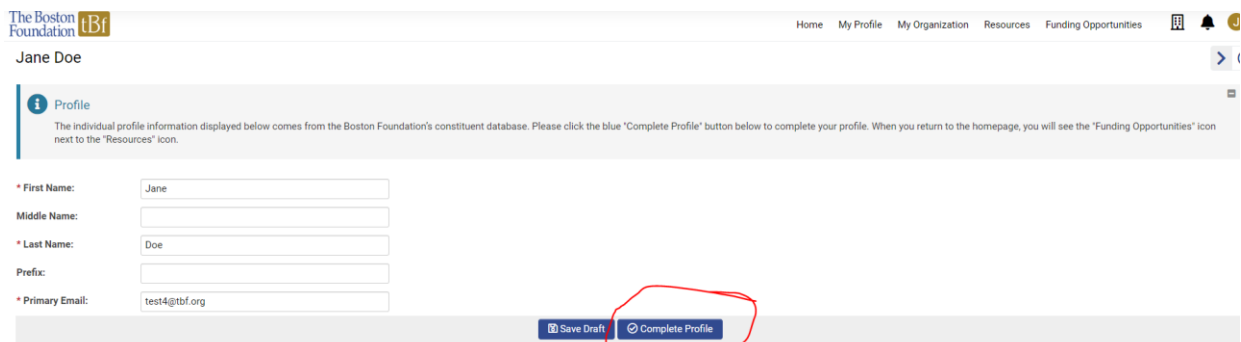
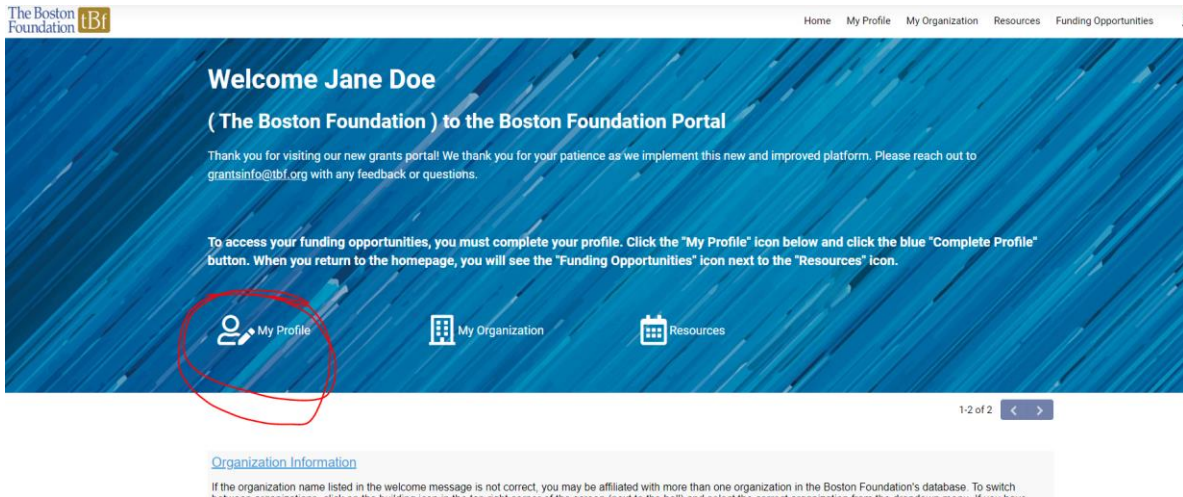
Please click on one of the buttons below to set up a **new** SmartSimple account **as a grant applicant**. These forms are for new grant applicant registrants only. If you already have a SmartSimple account, please go back to the main login page <https://bostonfoundation.smartsimple.com> and use the password reset link. For questions, please email grantsinfo@tbf.org.

I am applying for a grant:

On behalf of an Organization

As an Individual or as part of a Group of Individuals

3. Register yourself or your organization. **Read the instruction box carefully.** If you are registering on behalf of an organization, you should first search the TBF database for your organization, then register yourself as a contact at that organization. If you cannot find your organization in TBF's database, you can use either the IRS search form or the open form to find and register your organization. Click the blue "Submit" button at the bottom of the page when finished. If you need step by step instructions for searching TBF's database, using the IRS search form, or using the open form, please scroll down to find the relevant instructions.
4. Once you have clicked the blue "Submit" button, you will be prompted to check your email to set up a new password for your account. Follow the instructions provided in the email to log into the system.
5. When you first log in, you will be instructed to complete your profile and/or your organization's profile. **You will not be able to access the "Funding Opportunities" icon until you have done this.** To complete the profiles, click on the "My Profile" icon and the "My Organization" icon (if needed) and click the blue "Complete Profile" button.



When you navigate back to the home page, you should see the Funding Opportunities icon, and you can now submit an application for open funding opportunities. If you have any trouble, please reach out to grantsinfo@tbf.org.

If needed, please see below for step by step instructions to search for your organization in TBF's database, registering your organization using the IRS search, or registering your organization using the open form.

Searching TBF's Database:

Finding your organization through TBF's database: begin typing your organization name into the Organization Name field circled in red below. Select the organization once it pops up in the box. Fill out the rest of the contact information fields. Click the blue Submit button at the bottom of the page once finished. You will be directed to check your email for a link to reset your password.

Organization Information and Account Setup

Instructions

Please enter the organization name to search for your organization below. Required fields are marked with an asterisk "*".

If you cannot find your organization with the form below, please try [searching the IRS database](#) to register your organization.

If you cannot find your organization in either the form below or in the IRS database, use the [open form](#) to register your organization and create an account.

If you have trouble, please reach out to grantsinfo@tbf.org.

For Contact Information:

- Please input your **nonprofit's address** in the field below.
- We encourage you to use your email address and phone number **associated with your work/nonprofit**, when possible, rather than a personal, non-work account.

* Organization Name

Contact Information

* First Name

Middle Name

* Last Name

Primary Phone

* Primary Email

Prefix

* Address

Address 2

* City

* Country

United States

* State / Province

* Zip / Postal Code

Submit

Using the IRS Search Form:

In the instruction box, click on the link to the IRS search form, circled in red below.

Organization Information and Account Setup

Instructions

Please enter the organization name to search for your organization below. Required fields are marked with an asterisk "*".

If you cannot find your organization with the form below, please try [searching the IRS database](#) to register your organization.

If you cannot find your organization in either the form below or in the IRS database, use the [open form](#) to register your organization and create an account.

If you have trouble, please reach out to grantsinfo@tbf.org.

For Contact Information:

- Please input your **nonprofit's address** in the field below.
- We encourage you to use your email address and phone number **associated with your work/nonprofit**, when possible, rather than a personal, non-work account.

* Organization Name

Contact Information

* First Name

Middle Name

* Last Name

Primary Phone

* Primary Email

Prefix

Once you are in the IRS search form, type in either your EIN, organization name, or address to search for your organization. Click the blue Search button at the bottom of the screen to see the search results.



Organization Search



Enter one of the following criteria below to search for your organization.

1. **EIN** - Do not include spaces or dashes, example: "123456789"
2. **Name** - Keyword search is sufficient, example: "Waco" instead of "The Waco Foundation"
3. **State** - Use the two letter abbreviation, example: "NY" instead of "New York"

NOTE: Your organization's EIN (Employer Identification Number) can be located on your IRS Letter of Determination

[Go Back to Main Registration Page](#)

EIN

Name

Address

City

State

Search

Select your organization by clicking on the row. If you need to redo your search, you can use the Refine Search blue button at the top left of the screen.



Organization Results

[Refine Search](#)

i Instructions:
Click on the row to select the organization.

If you do not see your organization listed in the IRS search results below, you can use the "Refine Search" button at the top left to search the IRS database again. If your organization is not in the IRS database, please use the open form to register your organization. If you need assistance, please reach out to grantsinfo@tbf.org.

[Go Back to Main Registration Page](#)

#	EIN	Organization Name	Address	City	State / Province	Zip / Postal Code
1.	581486099	BOSTON CEMETERY MAINTENANCE FOUNDATION INC	PO BOX 492	BOSTON	GA	31626-0492
2.	832062575	AMERICAN CANCER FOUNDATION OF BOSTON INC	1324 FOREST AVENUE STE 420	STATEN ISLAND	NY	10302-2044
3.	814629816	MARIE BARNEY BOSTON SCHOLARSHIP FOUNDATION INC	1225 WEST BEAVER STREET	JACKSONVILLE	FL	32204-1414
4.	042104021	BOSTON FOUNDATION INC	75 ARLINGTON STREET	BOSTON	MA	02116-3936
5.	042472758	CHILD HEALTH FOUNDATION OF BOSTON INC	818 HARRISON AVE DOWLING 3 SOUTH	BOSTON	MA	02118-0000
6.	042566212	CARIBBEAN FOUNDATION OF BOSTON INC	317 BLUE HILL AVE	DORCHESTER	MA	02121-4302
7.	042602576	FOUNDATION FOR BOSTON CENTERS FOR YOUTH & FAMILIES INC	1483 TREMONT ST	BOSTON	MA	02120-2908
8.	042731195	BOSTON GLOBE FOUNDATION INC	1 EXCHANGE PL STE 201	BOSTON	MA	02109-2132

When you click on your organization, your organization's information will automatically populate into the organization information fields. Scroll down and fill out your contact information. You can use the Copy Address button to copy the organization's mailing address into the fields for your own mailing address. Click the blue Submit button when you are finished. You will be directed to check your email for a link to create a password.



Instructions

Please complete the remaining required fields below "*"

For Contact Information:

- Please input your **nonprofit's address** in the field below or click the "Copy Address" button above.
- We encourage you to use your email address and phone number **associated with your work/nonprofit**, when possible, rather than a personal, non-work account.

[Go Back to Main Registration Page](#)

* Organization Name

BOSTON FOUNDATION INC

Address

75 ARLINGTON STREET ?

Address 2

* City

BOSTON

* Country

United States ▼

* State / Province

Massachusetts ▼

Zip / Postal Code

02116-3936

EIN

042104021 ?

BMF Subsection

03

Your Contact Information

[Copy Address](#)

* First Name

Middle Name

* Last Name

Primary Phone

* Primary Email

Prefix

* Address

Address 2

* City

* Country

United States ▼

* State / Province ▼

* Zip / Postal Code

[Submit](#)

Using the Open Form:

If you cannot find your organization via the IRS database search, you can use the open form to provide information about your organization and set up your account. Fill out the information for both your organization and for your contact information, then click the blue Submit button when you are finished. You will be prompted to check your email at the address you provided to create a password for your account.

Organization Information and Account Setup

Instructions

Please complete the remaining required fields below *

For Contact Information:

- Please input your **nonprofit's address** in the field below or click the "Copy Address" button above.
- We encourage you to use your email address and phone number **associated with your work/nonprofit**, when possible, rather than a personal, non-work account.

[Go Back to Main Registration Page](#)

* Organization Name	<input type="text"/>
Address	<input type="text"/>
Address 2	<input type="text"/>
* City	<input type="text"/>
* Country	<input type="text" value="United States"/>
* State / Province	<input type="text"/>