



Economic Development Fund Management System User Guide



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1.0 Accessing the system

You can access the online funding application system (SmartSimple) through the Yukon.ca pages for the different Department of Economic Development funding programs.

As of August 2025, the access is located on the following page:

- Apply for community project and event funding (<https://yukon.ca/cdf>)

How to apply for funding

Before you apply

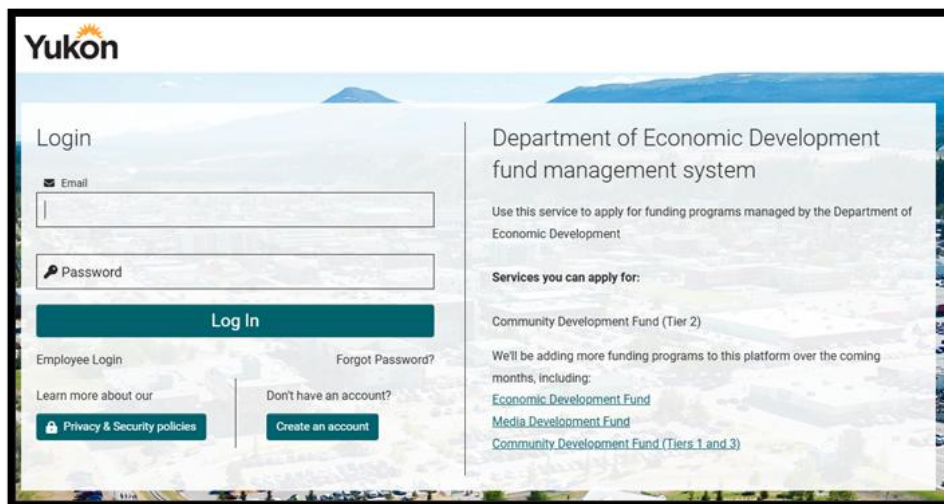
Contact a Community Development Fund advisor to find out if your project or event is eligible.

Apply for Tier 2 funding

Use our online system to apply for Tier 2 funding.

Apply to the Community Development Fund Tier 2 ←

Click “Apply to”. You will be taken to the log in page for the Department of Economic Development fund management system.



2.0 Create an account or log in

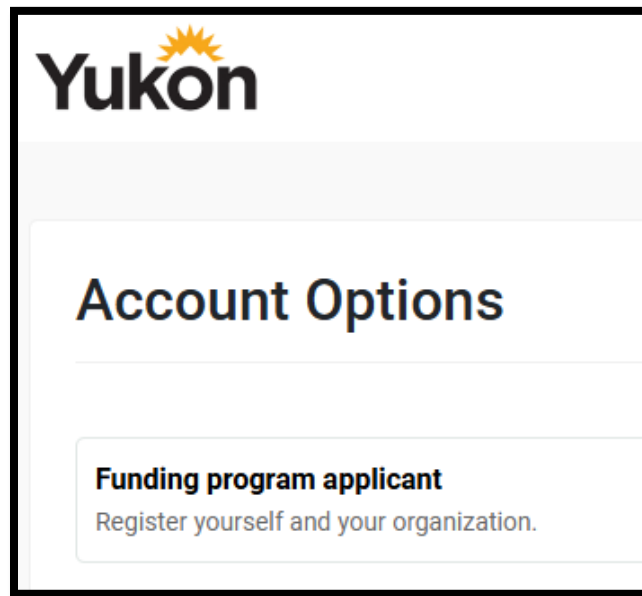
You need your own account to submit new applications, review active applications, or access files as a collaborator (refer to **7.0 Collaborators** for more information).

2.1 Create an account

Click “Create an account”.



On the next page, click “Funding program applicant” to register yourself and your organization.



On the new page, enter your organization name to search for your organization in the system.

As you start typing a name, the database will suggest a match.

If there's a match, proceed to **2.1.1 Organization name appears**.

If there's no match, skip to **2.1.2 Organization name not appearing**.

2.1.1 Organization name appears

If your organization's name appears, select and continue to complete the contact information.

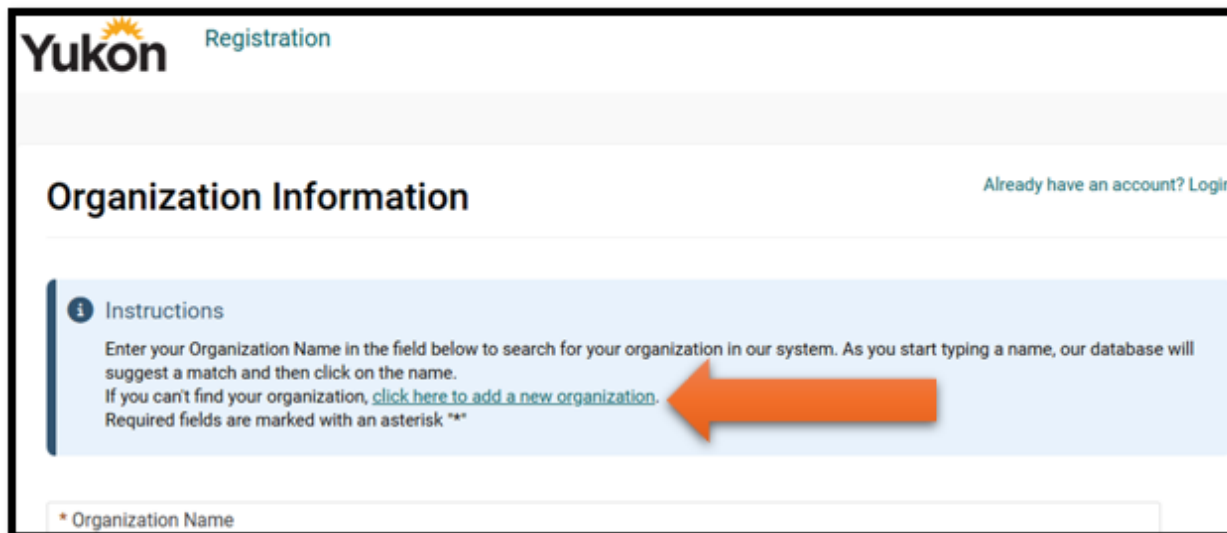
Click "Submit".

You will receive an email from noreply@smartsimplemailer.com with the subject line "Welcome to the Yukon Economic Development fund management system", with a link to create a password and log in. If you do not receive this email within five minutes, check your spam or junk folder.

Proceed to **2.4 Create Password**.

2.1.2 Organization name not appearing

If your organization's name does not appear, add a new organization by clicking "click here to add a new organization" in the instructions box.



Yukon Registration

Organization Information

[Already have an account? Login](#)

Instructions

Enter your Organization Name in the field below to search for your organization in our system. As you start typing a name, our database will suggest a match and then click on the name.
If you can't find your organization, [click here to add a new organization](#).
Required fields are marked with an asterisk "**

* Organization Name

Enter the organization name as it is registered or legally recognized (i.e. no short form).

Select your organization type in the drop-down menu.

You may be prompted for additional information based on your organization type.

Enter the address you would like mail to be delivered to.

Enter the organization's mandate.

Enter your contact information.

Click "Submit".

You will receive an email from noreply@smartsimplemailer.com with the subject line "Welcome to the Yukon Economic Development fund management system", with a link to create a password and log in. If you do not receive this email within five minutes, check your spam or junk folder.

Proceed to **2.4 Create Password**.

2.2 Log in to your account

If you have already created an account, enter your email and password.

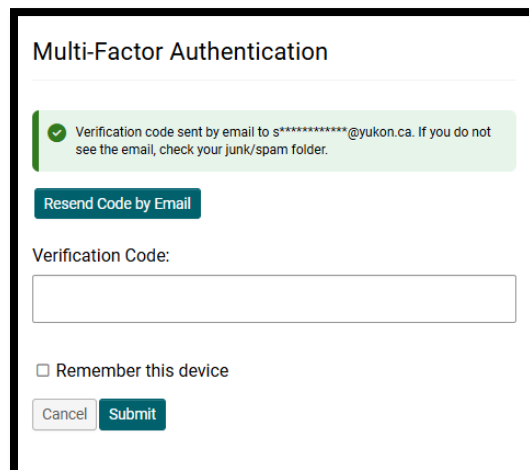
Click “Log In”.

A screenshot of a web application's login page. The page has a light blue background with a white login form. The form contains two input fields: "Email" and "Password". Below the password field is a teal "Log In" button, which is circled in red. Underneath the "Log In" button, there are links for "Employee Login" and "Forgot Password?". At the bottom of the form, there are two columns of links: "Learn more about our" with a "Privacy & Security policies" button, and "Don't have an account?" with a "Create an account" button.

You will be taken to the multi-factor authentication page for you to enter a verification code. You will receive an email from donotreply@smartsimplemailer.com, with the subject line “Temporary Verification Code”, with a verification code.

If you do not see the email, check your spam or junk folder.

Enter the verification code from your email and click “Submit”. If you are on a personal device, click “Remember this device” to reduce the frequency of verifications from the system.

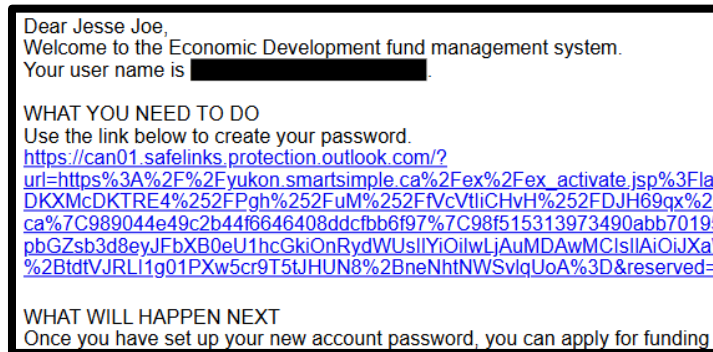
A screenshot of a "Multi-Factor Authentication" page. The page has a white background with a black border. At the top, it says "Multi-Factor Authentication". Below that, there is a green notification box with a checkmark icon and the text: "Verification code sent by email to s*****@yukon.ca. If you do not see the email, check your junk/spam folder." Below the notification box is a teal "Resend Code by Email" button. Underneath is a "Verification Code:" label followed by a white input field. Below the input field is a checkbox labeled "Remember this device". At the bottom, there are two buttons: a grey "Cancel" button and a teal "Submit" button.

You are now logged in.

Proceed to **3.0 Home page**.

2.4 Create password

You will receive an email from noreply@smartsimplemailer.com, with the subject line “Welcome to the Yukon Economic Development fund management system”, instructing you to reset your password.



Click on the link in the email to create a password and activate your account.

A new page will open for you to create your password.

Account Activation

New Password:

Confirm Password:

Policy:

- Password must have at least 8 characters
- Password must have at least one lowercase letter
- Password must have at least one uppercase letter
- Password must have at least one number
- Password must have at least one special character

g5b_e_c5

Enter the characters you see

If your password is successfully created, you will receive an email from noreply@smartsimplemailer.com, with the subject line “Your password has been changed”, notifying you the password has been changed.

A new page will pop open to ask you to enter your verification code.

Multi-Factor Authentication

✓ Verification code sent by email to s*****@yukon.ca. If you do not see the email, check your junk/spam folder.

Resend Code by Email

Verification Code:

Remember this device

You will also receive an email from noreply@smartsimplemailer.com, with the subject line “Temporary Verification Code” with a verification code.

If you do not see the email, check your spam or junk folder.

Enter the verification code from your email and click “Submit”. If you are on a personal device, click “Remember this device” to reduce the frequency of verifications from the system.

You are now logged in.



3.0 Home page

After you are logged in, you will be able to:

- Apply to Funding Programs – refer to **4.0 Apply to Funding Programs** for instructions.
- See your existing/active submissions.
- Save and manage your applications.
- Add collaborators to your applications – refer to **7.0 Collaborators** for instructions.
- Update your profile.

Apply to a Yukon Department of Economic Development funding program

[Funding Opportunities](#) [My Profile](#) [Organization Profile](#)

Use this service to submit, **save and manage your applications** to economic development funding programs offered by the Government of Yukon.

Get started:

- Select Funding Opportunities.
- Select the funding program you want to apply to.
- Complete and submit your application.
- Manage your applications in the item sections below.

Website feedback

Take our [1-minute citizen satisfaction survey](#) to tell us about your experience. We use this information to improve the service.

Action Items

⊙ APPLICATIONS (0) ≡ ACTIVITIES (0)

Search: [] 0 of 0 < >

#	Application ID	Project name	Status	Funding program	Organization	Primary contact
No Results Found						

Completed Items

✓ COMPLETED APPLICATIONS (0) ✓ COMPLETED ACTIVITIES (0)

Search: [] 0 of 0 < >

4.0 Apply to funding programs

To see what programs are accepting applications, click “Funding Opportunities”.

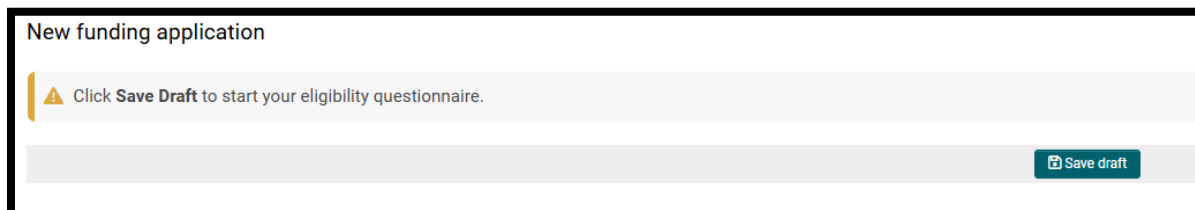
Note: If you are a consultant applying on behalf of a client, your client will have to start the application process and add you as a collaborator. Refer to **7.0 Collaborators** for instructions on how to add a collaborator.



If the program is accepting applications, an “Apply Now” button will appear. Select the funding program you want to apply to.



You will be taken to a new page.



Click “Save draft” to start your eligibility questionnaire.

4.1 Eligibility questionnaire

You must read and complete the eligibility questionnaire to confirm eligibility to proceed with your application.

Note: Read the prompts in the grey box for more details to the question.

If you cannot complete the questionnaire in one session, click “Save draft” and return later.

If you require assistance with completing the questionnaire, leave a note. Refer to **5.0 Notes** for instructions.

After you have completed the questionnaire, click “Confirm eligibility”.

The screenshot shows a web application interface for an eligibility questionnaire. On the left is a dark sidebar with 'Main' and 'Notes' options. The main content area is titled 'CDF-2-1028' and 'ELIGIBILITY QUESTIONNAIRE'. It contains several sections, each with a grey informational box and radio button options:

- Organization type:** Registered non-profit society.
- Our organization is only submitting one application for this intake.**
Informational box: We strongly recommend limiting applications to one per organization per intake.
Options: Yes, No.
- * Our organization has not paid for or ordered any of the expenses that we are requesting funding for.**
Informational box: We will not fund any items that have been ordered or paid for before the project funding is approved.
Options: Yes, No.
- * Our organization is requesting funding for 90% or less of the total project cost.**
Informational box: We will fund a maximum of 90% of eligible costs.
Options: Yes, No.
- * Our organization agrees to pay any ongoing operations and maintenance costs resulting from this project, if applicable.**
Informational box: O&M costs will not be covered by the Community Development Fund.
Options: Yes

At the bottom right, there are two buttons: 'Save draft' and 'Confirm eligibility'.

4.1.1 Failed eligibility questionnaire

If you do not meet the eligibility criteria, there will be a message box at the top of the page informing you that your project is not eligible to apply.

Eligibility Failed

- You are not eligible to apply.
- If you believe this occurred in error, email cdf@yukon.ca or phone (867) 667-8125. Include your application number in your inquiry.

ELIGIBILITY QUESTIONNAIRE

If you think there is an error in your submission, contact cdf@yukon.ca or 867-667-8125 before you start a new eligibility questionnaire.

4.1.2 Passed eligibility questionnaire

If you passed the eligibility questionnaire, you will be redirected to another page to proceed with your application.

CDF-2-1040

- Use the section headings below to navigate through the application. Alternatively, use the next and back buttons at the bottom of the page to move between application sections.
- Do not click submit until you have completed all sections.
- Some fields are pre-filled with information you added to your personal and organization profiles. Update these profiles if your information changes to ensure it appears in the form.
- If you need help with your application, use the Notes tab in the left-hand menu to communication with staff. You can also call 867-667-8125 Monday to Friday from 8:30 am to 4:30 pm.

Application Summary

CONTACT INFORMATION ELIGIBILITY QUESTIONNAIRE PROJECT INFORMATION DECLARATIONS SIGNATURE

Organization information

Super Star Volleyball
123 Pink Street
Whitehorse, YT, Y1A 1X1
Phone:

Primary Contact

M NS
Phone: 123-456-7890
Email: shirley.ng+15@yukon.ca

Save draft **Finish and submit** **Withdraw**

Proceed to **6.0 Completing the application.**

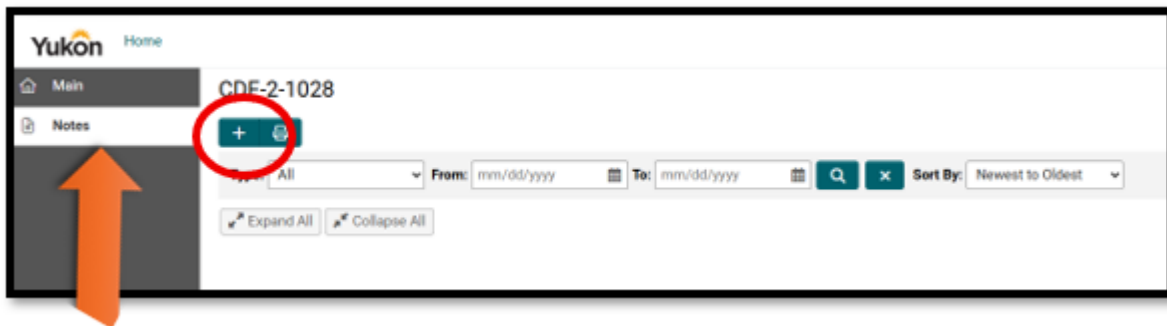
5.0 Notes

5.1 Sending notes

If you need help with your application, use the “Notes” tab in the left-hand menu to communicate with staff. You can also call 867-667-8125 Monday to Friday from 8:30 a.m. to 4:30 p.m.

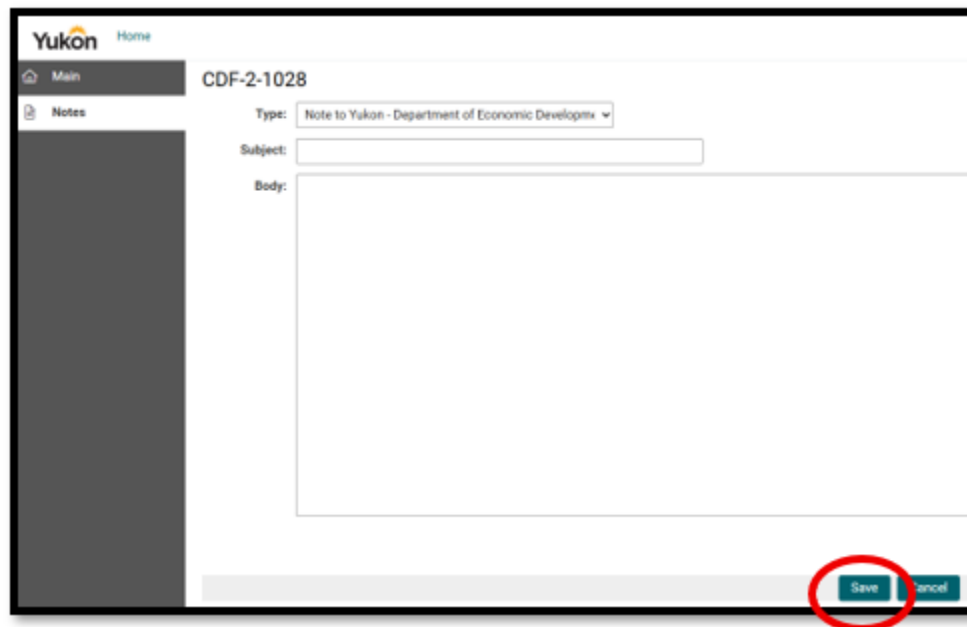
To leave a note, open the “Notes” tab.

Click the + button.



A new page will open.

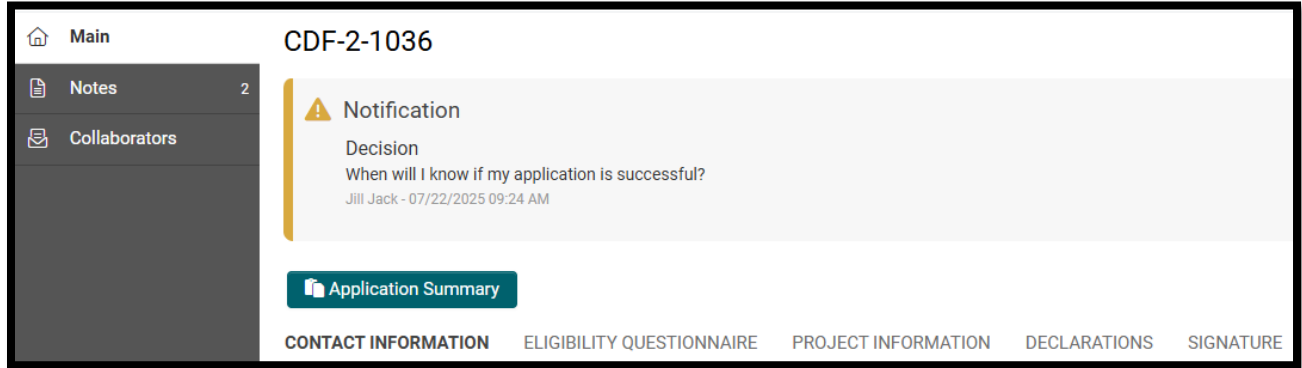
Leave a message with a subject.



Submit by clicking “Save”.

Your message will be sent to our staff and you will receive a response under “Notes.”

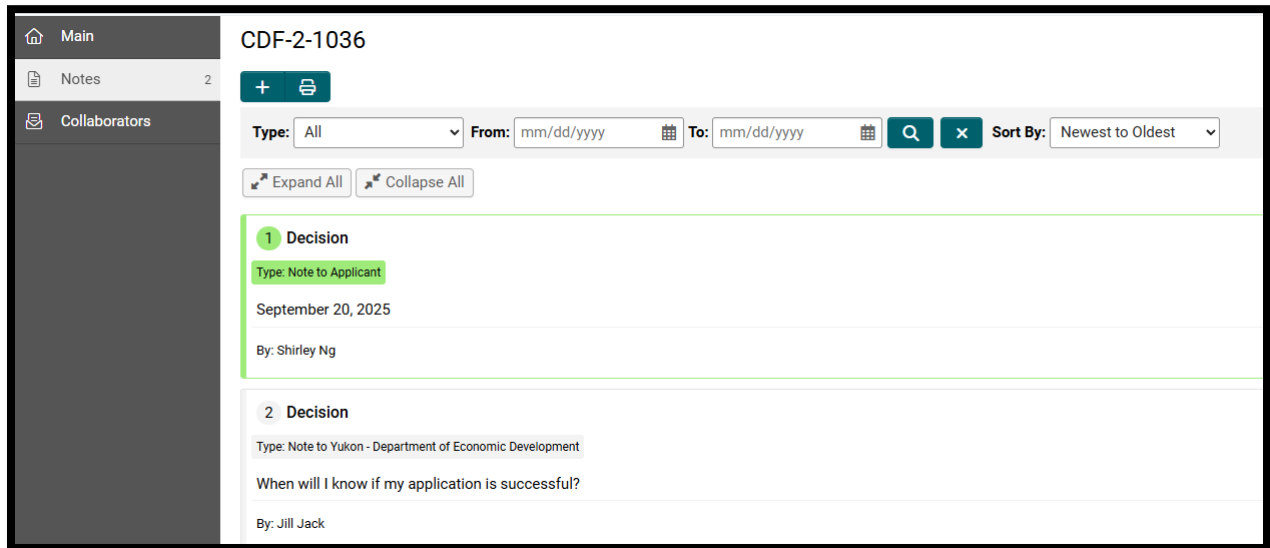
Your note will appear at the top of the file's main page.



5.2 Receiving notes

Once an advisor has responded, you will receive an email notification from noreply@smartsimplemailer.com, with the subject line “New Note added”.

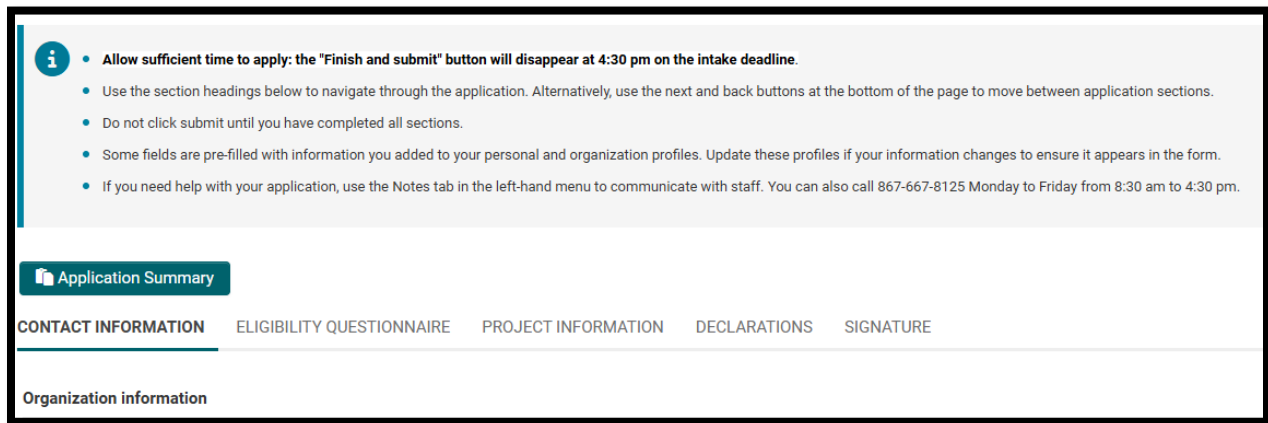
You will find the response to your note on the “Notes” page.



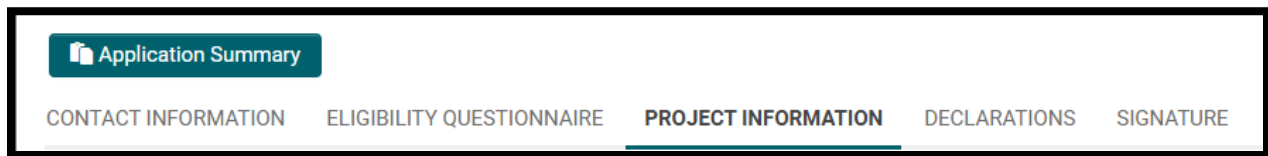
6.0 Completing your application

Read the instructions at the top of the page before you proceed. The application must be submitted before the intake deadline. After the intake deadline, the “Finish and Submit” button will disappear.

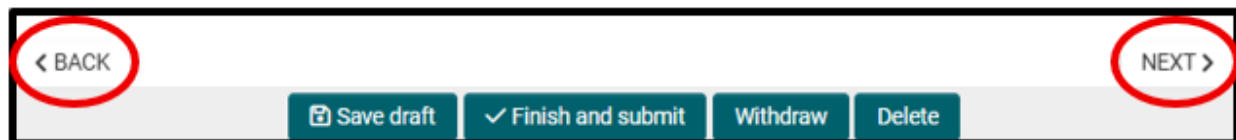
Check that the contact Information is up to date; if not, update it in the “Organization Profile” page. You can access your profiles via Home at the top of the web page. – refer to **3.0 Home page** for instructions.



You can use the section headings to go to that part of the application.



You can also use the next and back buttons at the bottom of the page to move between application sections.



Do not click “finish and submit” until you have completed all sections. Click “Save draft” before going to the next tab.

If you need help with your application, use the “Notes: tab in the left-hand menu. to communicate with staff, refer to **5.0 Notes** for instructions. You can also call 867-667-8125 Monday to Friday from 8:30 am to 4:30 pm.

You can invite people to contribute to your application. Refer to **7.0 Collaborators** for instructions.



6.1 Project information

Go to the “Project Information: tab and complete each section per the instructions in the grey box.

Save your draft frequently.

Refer to **6.1.1 Project Financials** when you are ready to submit the project budget.

The screenshot shows a web application interface for a project application. At the top, the application ID 'CDF-2-1038' is displayed. Below it, a navigation bar contains several tabs: 'Application Summary', 'CONTACT INFORMATION', 'ELIGIBILITY QUESTIONNAIRE', 'PROJECT INFORMATION' (which is circled in red), 'DECLARATIONS', and 'SIGNATURE'. The 'Project summary' section is expanded, showing three main input areas:

- Project name:** A text input field with a red asterisk indicating it is required.
- Project type:** A dropdown menu with the instruction 'Select the option that best describes your project.' and the current selection 'Select One'.
- Project description:** A text area with the instruction 'Tell us about your project in 1-2 sentences.'

Below these is the **Community** section, which includes a dropdown menu for 'Where will the project take place?' with the current selection 'Select One'. At the bottom left, there is a '< BACK' button and a 'Project details' link. At the bottom right, there are three buttons: 'Save draft', 'Finish and submit', and 'Withdraw'.

6.1.1 Project financials

After entering the “Amount requested” and “Total project cost,” click “Save draft.”

CONTACT INFORMATION ELIGIBILITY QUESTIONNAIRE **PROJECT INFORMATION**

*** Amount requested**

This is the total amount of funding you're applying for.

? ↻

*** Total project cost**

This is the total cost for this project.

? ↻

Request percentage

To complete the “Project Financials” section, download the budget template by clicking the “Download the Excel template” link.

Note: The project budget must be completed in our budget template, or the application will not be accepted.

Project financials

In this section, you will download our budget template, add your details and upload it.

*** Project budget**

[Download the Excel template](#)

You can drag and drop your completed file into the space below or browse files to upload your project budget.


- For Tier 2 funding, your funding request must fall in the \$20,001 to \$75,000 range.

Open the worksheet.


The worksheet has 3 tabs, complete only the “Applicant To Complete” tab.

1 - Applicant To Complete 2 - Internal Use Only - Advisor 3 - Internal Use Only - Unit +

There are three sections in that tab: “Budget items”, “Fiscal Year Breakdown” and “Name of Other Funding Sources” (if applicable). Follow the instructions in the worksheet to complete this section.



CDF Project Budget



Applicant name: _____
Project name: _____

Complete the detailed project budget below showing the minimum 10% applicant equity.
- Start with Budget Item Without GST
- The GST amount will auto calculate; delete the amount if it's not applicable
- Update the CDF Request, Proponent Cash Contribution, Proponent In-Kind Contribution and Other Sources until there's no Variance

Note that only 2.5% of GST is eligible for funding (if applicable).

Justify all budget items
• Under \$1,000 – provide a breakdown of the expense (for example: printing \$20/manual x 20 participants).
• Over \$1,000 – include with the application a minimum of two quotes from suppliers, contractors or consultants

Budget Item	Budget Item Without GST	GST @ 5% (Delete amount if not applicable)	CDF Request	Proponent Cash Contribution	Proponent In-Kind Contribution	Other Sources	Budget Subtotal	Variance
-------------	-------------------------	---	-------------	-----------------------------	--------------------------------	---------------	-----------------	----------

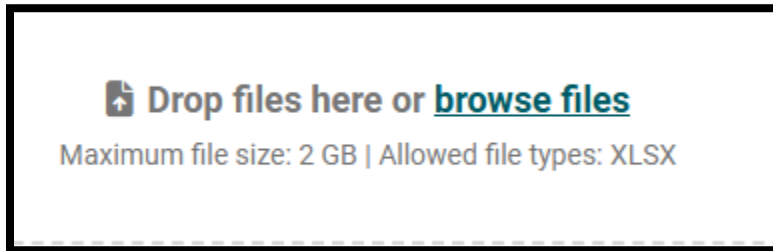
Budget Item	Budget Item Without GST	GST @ 5% (Delete if not applicable)
		-
		-
TOTAL	-	-
Fiscal Year Breakdown	Fiscal Year	Total Budget Allocation
Select the Fiscal Year.	2025/26	
For each row, enter the amount you will spend in each category for that year.	2026/27	
Fiscal year is from April 1 to the following March 31.	Variance	-
Name of Other Sources	Amount Approved/Requested	Status of Application
VARIANCE	\$ -	



Save the completed worksheet and rename it with the following name convention:

Filename_ProjectBudget_Applicant e.g. CDF-2-1001_Project Budget_Applicant

Drag and drop the completed worksheet into the drop box or browse files to upload your project budget worksheet.



If you need to edit, rename or delete the saved worksheet, click on the three dots on the right-hand side.



6.1.2 Supporting documents

Check all the boxes that apply.

An upload box will appear for each document type selected.

Supporting documents

Identify which relevant supporting documents you are including

Check all that apply. An upload box will appear for each document type selected. Add a brief description of the file contents once the document is uploaded. Hover the cursor below the word Description to enter the text. To save your description, click on the save icon on the right of the description field.

- 1. Support letters from stakeholders or partners
- 2. Quotes for all items over \$1000
- 3. Confirmation of in-kind contributions and/or donations
- 4. Confirmation of other sources of funding
- 5. Regulatory or legal documents (permits, environmental assessments, leases)

After you upload a file, you will have to include a description of the item. Click the floppy disk icon to save the description.

Upload support letters from stakeholders or partners

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

File Name	Description	Size	Date	
Heat2.jpg	EXAMPLE x 	2.9 KB	07/08/2025 9:41 AM	

Click “Save Draft” at the bottom of the page.

Move on to the declarations tab after the project information tab is completed.

[CONTACT INFORMATION](#)
 [ELIGIBILITY QUESTIONNAIRE](#)
 [PROJECT INFORMATION](#)
 [DECLARATIONS](#)
 [SIGNATURE](#)

6.2 Declarations

There are four sections to the declaration tab.

Review and check the “Yes” box if you agree to the first three sections.

Section four is optional.

CONTACT INFORMATION ELIGIBILITY QUESTIONNAIRE PROJECT INFORMATION **DECLARATIONS** SIGNATURE

*** As the person applying for this funding, I confirm:**

- the information in this application is accurate and true to the best of my knowledge;
- I have the support of the organization's board (if applicable);
- the project will follow and meet existing municipal, territorial and federal regulations; and
- I understand that all, or part of this application, may be available to the public. If it is, it will follow the *Access to Information and Protection of Privacy Act*.

Yes

*** As the person applying for this funding, I authorize the Government of Yukon to:**

- access the project site and premises;
- inspect the books and records;
- make inquiries and credit checks; and
- get information necessary to evaluate this application.

Yes

*** If the government decides to fund this project, I confirm the organization will follow the terms and conditions in the payment agreement**

Yes

Self identification (optional)

You do not have to complete this question to apply for funding. We collect this information for statistical purposes so we can improve our services.

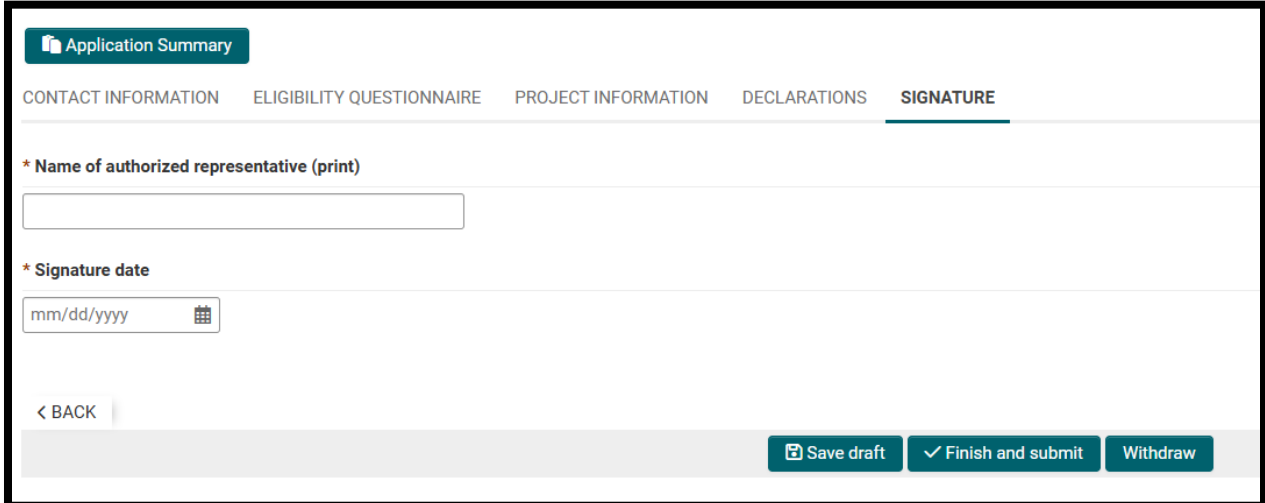
Does your organization identify as majority owned by any of the following?
Select all that apply.

Move on to the signature tab after the declaration tab is completed.



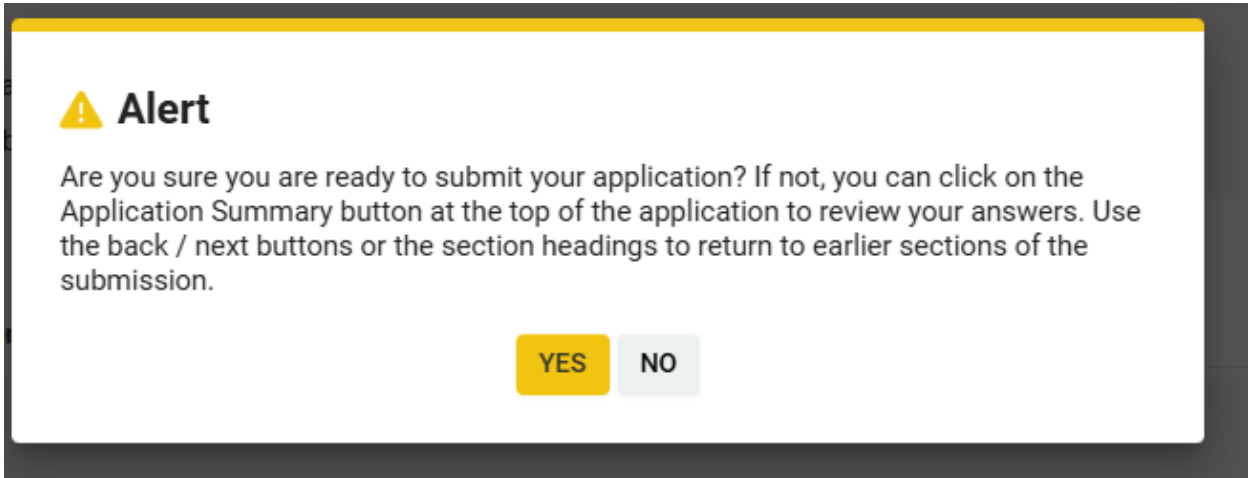
6.3 Signature

Complete the signature tab and click “Finish and submit” when ready. The “Finish and submit” option will not be available after the intake deadline. Make sure the application is submitted before then.



The screenshot shows the 'SIGNATURE' tab of an application form. At the top left, there is a button labeled 'Application Summary'. Below it, a navigation bar contains the following tabs: CONTACT INFORMATION, ELIGIBILITY QUESTIONNAIRE, PROJECT INFORMATION, DECLARATIONS, and SIGNATURE (which is currently selected). The main content area contains two mandatory fields, each marked with an asterisk: '* Name of authorized representative (print)' with an empty text input field, and '* Signature date' with a date input field showing 'mm/dd/yyyy' and a calendar icon. At the bottom left, there is a '< BACK' button. At the bottom right, there are three buttons: 'Save draft', 'Finish and submit', and 'Withdraw'.

If you have completed all mandatory fields and there are no errors, you will be asked to confirm that you are ready to submit.



The screenshot shows an 'Alert' dialog box with a yellow warning icon. The text inside the dialog reads: 'Are you sure you are ready to submit your application? If not, you can click on the Application Summary button at the top of the application to review your answers. Use the back / next buttons or the section headings to return to earlier sections of the submission.' At the bottom of the dialog, there are two buttons: 'YES' (highlighted in yellow) and 'NO' (highlighted in grey).

If you skip a mandatory field or do not follow instructions, an error message will appear at the top of the page, advising what needs to be updated or provided.

You will not be able to proceed until all sections have been completed correctly.

After the application has been updated, you must click “Save draft” before you can finish and submit.

CDF-2-1029

✖ Submission Failed:

- Project name cannot be empty.
- Project type cannot be empty.
- Project description cannot be empty.
- Community cannot be empty.
- Project activities cannot be empty.
- Project rationale cannot be empty.
- Project impacts cannot be empty.
- Fund objectives cannot be empty.
- Describe how your project supports each objective selected above. cannot be empty.
- Invalid date for Project start date. Enter date in the following format: mm/dd/yyyy
- Invalid date for Project end date. Enter date in the following format: mm/dd/yyyy
- Project budget must contain at least 1 file
- Invalid numeric input of Amount requested
- Community Development Fund Tier 2 funding is \$20,001 to \$75,000. Adjust your project budget accordingly.
- Invalid numeric input of Total project cost
- This project has received Government of Yukon funding cannot be empty.
- As the person applying for this funding, I confirm: cannot be empty.
- As the person applying for this funding, I authorize the Government of Yukon to: cannot be empty.
- If the government decides to fund this project, I confirm the organization will follow the terms and conditions in the payment agreement cannot be empty.
- Name of authorized representative (print) cannot be empty.
- Invalid date for Signature date. Enter date in the following format: mm/dd/yyyy

i

- Use the section headings below to navigate through the application. Alternatively, use the next and back buttons at the bottom of the page to move between application sections.
- Do not click submit until you have completed all sections.

Save draft
Finish and submit
Withdraw

If your submission is successful, you will receive the following pop-up message and an email confirmation from noreply@smartsimplemailer.com within the next five minutes. If you don't receive this email, check your spam or junk folder.

Submission Successful

Application submitted successfully.

Home

The email will outline what you need, what will happen next, details of your submission and what to do if you need help. It will also include a copy of your application.



7.0 Collaborators

To invite others to collaborate on your application, use the “Collaborators” tab in the left-hand menu to invite them. Collaborators can view the project status, access existing work and contribute or submit information at any stage.

People without an active account in the system can still be invited as a collaborator, but they will need to create an account to access the application.

Click the + button and add as many people as you need.

Enter the person’s first and last name, and their email. If they are already a registered user, ensure you enter the email address associated with their existing account.



The screenshot shows a web interface for managing collaborators. On the left is a sidebar menu with three items: 'Main' (with a home icon), 'Notes' (with a document icon), and 'Collaborators' (with an envelope icon). The 'Collaborators' tab is selected. The main content area has a header 'CDF-2-1040'. Below the header is a table with three columns: 'Prefix', 'First name', and 'Last name'. A green button with a white plus sign is positioned to the left of the table. At the bottom right of the table area are two buttons: 'Save' and 'Invite'.

The person will be sent an email invitation from noreply@smartsimplemailer.com.

7.1. Invitation to collaborate

If you were invited to collaborate, you will receive an email invitation from noreply@smartsimplemailer.com, with the subject line “Invitation to collaborate”.

Click on the link in the email to open the invitation.



Dear Jesse Joe,

This is a message from the Yukon Department of Economic Development fund management system. You have been invited as a Collaborator for the following application: Community Development Fund CDF-2-1040 Great New Project.

WHAT YOU NEED TO DO

Click on the link below to accept or decline the invitation.

https://yukon.smartsimple.ca/ex/ex_invitation.jsp?lang=1&token=%24Wr7B90vG%2Fa3QbE0yQ8NT066Z8EdtEVvPidQ%3

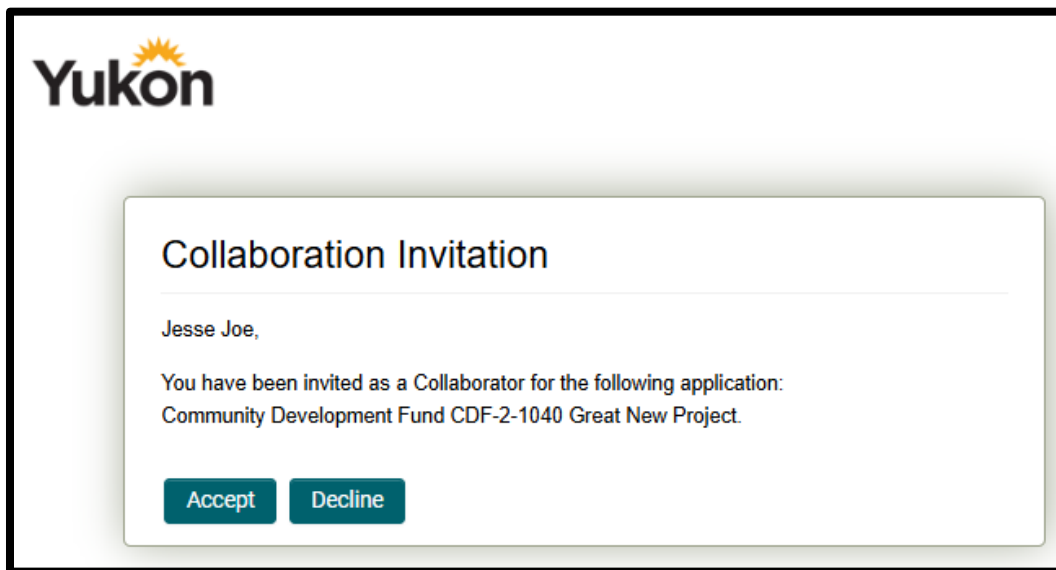
WHAT WILL HAPPEN NEXT

If you accept the invitation, you will be prompted to log in or create a new account. You will then be able to help complete this application to the Community Development Fund.

IF YOU NEED HELP

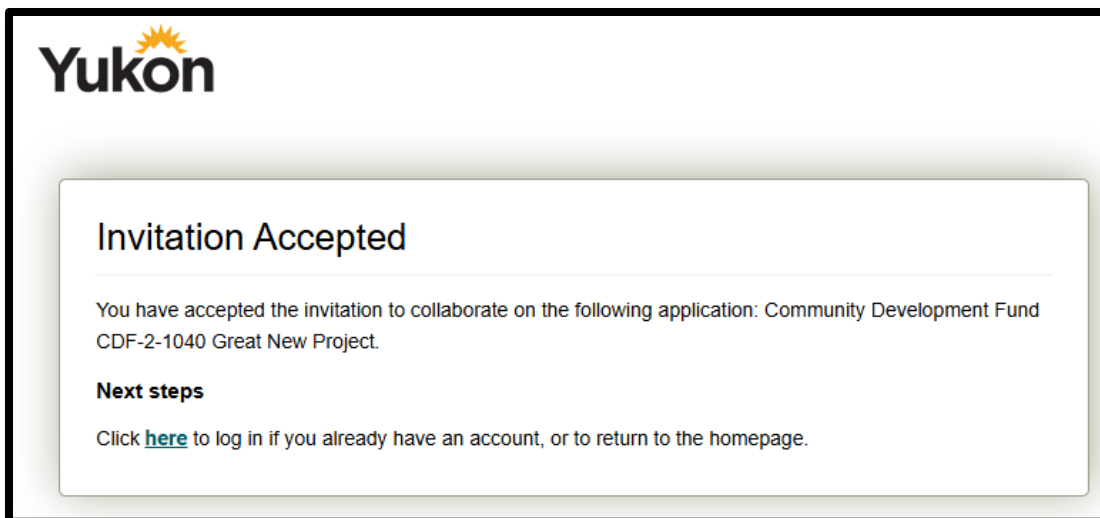
Contact the Community Development Fund at cdf@yukon.ca.

A new page will open, asking you to accept or decline the invitation.



If you accept the invitation, you will be instructed to log in or create an account.





Refer to **2.1 Create an account** for instructions on creating an account.

Refer to **2.2 Log in to your account** for instructions on how to log in.

After you are logged in, the application will appear under “Action Items” or “Completed Items”, depending on the stage of the application.



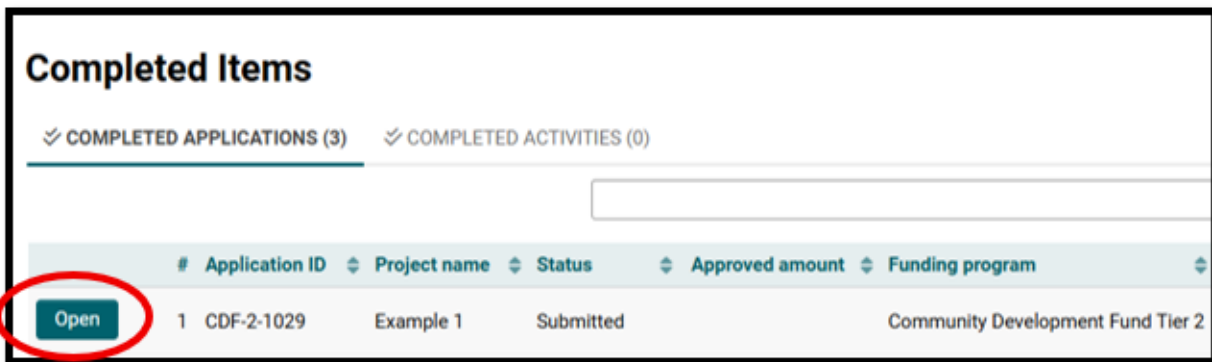
8.0 Application under review

During the review process, you will not be able to update your application unless you have been sent a revision request by your advisor. Refer to **9.0 Revision requests** for details and instructions.

You can find a record of your application submission by logging in to your account.

Your submission will be saved under “Completed Items”. This is also where you can see the status of your application.

If you require a copy of your application, open that submission, you will be taken to a different page.

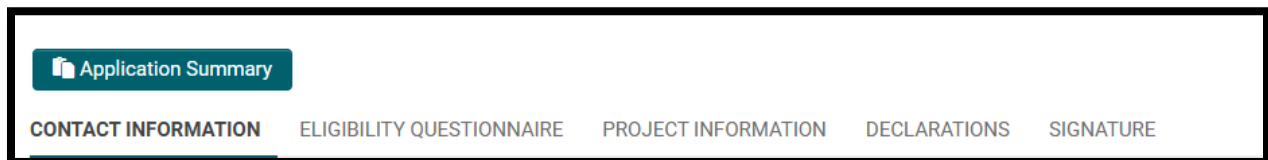


Completed Items

✓ COMPLETED APPLICATIONS (3) ✓ COMPLETED ACTIVITIES (0)

#	Application ID	Project name	Status	Approved amount	Funding program
1	CDF-2-1029	Example 1	Submitted		Community Development Fund Tier 2

You can download a copy of your application by clicking “Application Summary”.



Application Summary	CONTACT INFORMATION	ELIGIBILITY QUESTIONNAIRE	PROJECT INFORMATION	DECLARATIONS	SIGNATURE
----------------------------	---------------------	---------------------------	---------------------	--------------	-----------

If you have questions, you can leave a note for your advisor. Refer to **5.0 Notes** for instructions.

You can invite collaborators during the review process. Refer to **7.0 Collaborators** for instructions.

9.0 Revision requests

If your advisor requires additional information or revision, you will receive an email from noreply@smartsimplemailer.com with the subject line "Revisions Requested".

The email will advise you of the changes that are required to your application. You will need to sign in and open your application.

You can access your application at <https://yukon.smartsimple.ca/> or by clicking on the link in the email.

After you are logged in, open your application under "Action Items" to see what revisions are requested.

Action Items				
🔔 APPLICATIONS (1)		☰ ACTIVITIES (0)		
#	Application ID	Project name	Status	Funding program
Open	1 CDF-2-1036	Test application 1	Revisions Requested	Community Development Fund Tier 2

The requested revisions will be in a red message box at the top of the page.

Yukon Home

Logs ▾

Main CDF-2-1173

Notes 2

Collaborators

✖ Staff has requested the following revisions to your application
Go to Project Information tab and submit letters of support and quotes for contractors

After you have completed the revision request, click "Submit Revisions" at the bottom of the page.

Note: Do not click "Submit Revisions" until all the requested documents are submitted, as you will not be able to submit additional documents after the button is clicked. If you want your advisor to start reviewing the submitted documents, send them a note.

If you have questions about the requested revisions, leave a note for your advisor. Refer to **5.0 Notes** for instructions.

10.0 Application decision

10.1 Application denied

If your application is not successful, you will receive an email from noreply@smartsimplemailer.com, with the subject “Application Unsuccessful”.

No further action will be required.

10.2 Application approved

If your application is successful, you will receive an email from noreply@smartsimplemailer.com, with the subject “Application Approved”.

The email will give you a link to set up for direct deposit and inform you that a Transfer Payment Agreement will be sent to you soon. The agreement will outline the terms and conditions of the project’s funding.



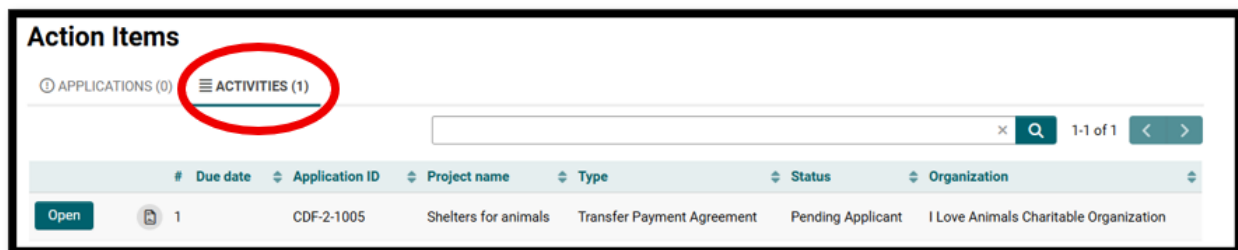
11.0 Transfer payment agreement

11.1 Receiving the agreement

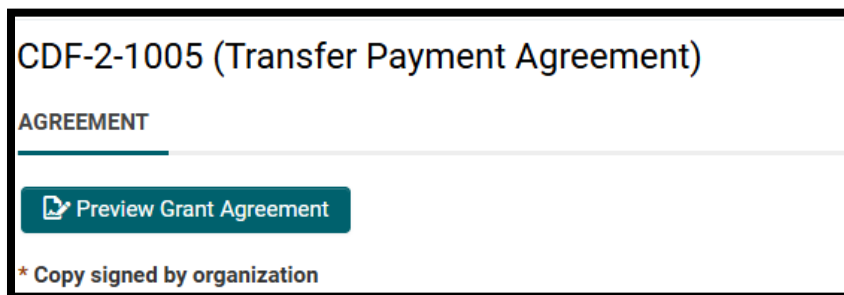
When your Transfer Payment Agreement is ready for review and signature, you will receive an email from noreply@smartsimplemailer.com, with the subject line “Transfer Payment Agreement is ready for your signature”.

Log in to access and upload the document. Refer to **2.2 Log in to your account** for instructions.

After you are logged in, look under “Action Items”, and then “Activities” to open the file.

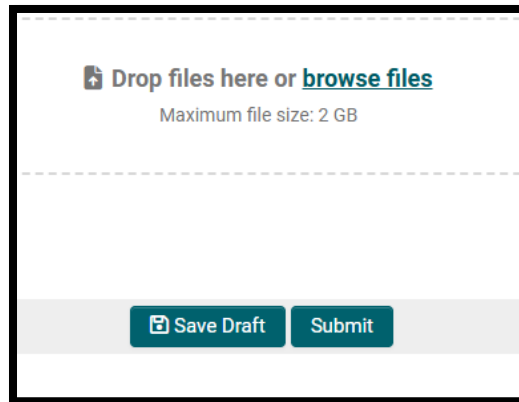


Click “Preview Grant Agreement” to download the Transfer Payment Agreement.



11.2 Submitting the agreement

After you have reviewed, printed and signed the agreement, upload and save it in the drop box, click “Submit”.



11.3 Agreement accepted

When your transfer payment agreement has been accepted and countersigned, you will receive an email from noreply@smartsimplemailer.com with instructions on the next steps and deliverables.

You can find a copy of your countersigned Transfer Payment Agreement under “Completed Items”, “Completed Activities”.

Completed Items				
✓ COMPLETED APPLICATIONS (1)		✓ COMPLETED ACTIVITIES (3)		
<input type="text"/>				
Application ID	Project name	Type	Status	
Open	CDF-2-1036	Test application 1	Transfer Payment Agreement	Completed

12.0 Deliverables

Your advisor will set up a deliverable schedule, as outlined in Schedule C of your Transfer Payment Agreement.

12.1 Receiving deliverable requests

Advisors will send emails through the system to request deliverables that will allow payments to the organization. The email will be from noreply@smartsimplemailer.com with the subject line “Deliverables for payment”.

The email will have the project deliverables details and the due date.

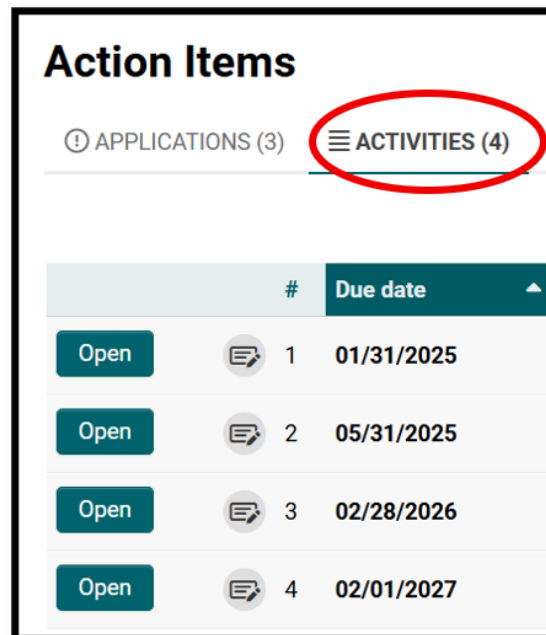
Payment will only be released if the requested deliverables are met.

To submit the deliverables, click the link in the email to log in.

After logging in, look under “Action Items”, “Activities”.

You can sort by due date to know which deliverable is required first if there are multiple activities.

Open the applicable task.

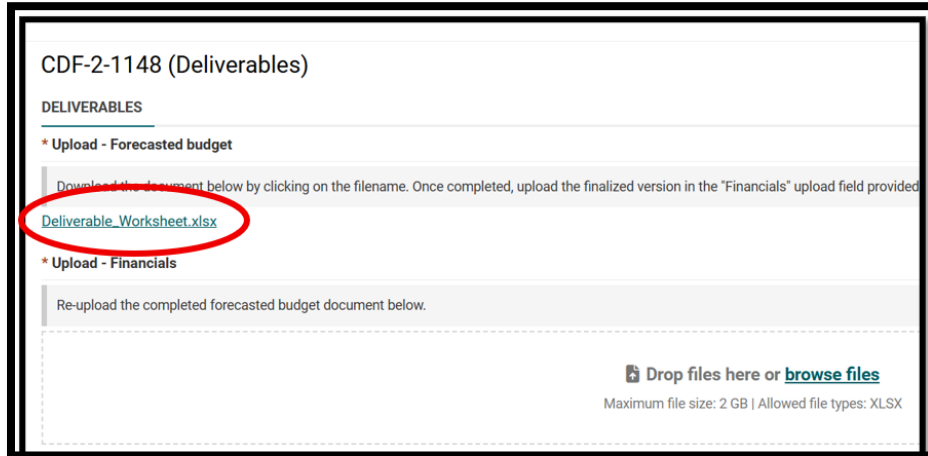


	#	Due date
Open	1	01/31/2025
Open	2	05/31/2025
Open	3	02/28/2026
Open	4	02/01/2027

12.2 Submitting the request

If your project is longer than four months, you will need to download and complete the forecasted budget worksheet.

If the project has more than one milestone, the worksheet will be carried forward by the advisor.



CDF-2-1148 (Deliverables)

DELIVERABLES

* Upload - Forecasted budget

Download the document below by clicking on the filename. Once completed, upload the finalized version in the "Financials" upload field provided.

[Deliverable_Worksheet.xlsx](#)

* Upload - Financials

Re-upload the completed forecasted budget document below.

Drop files here or [browse files](#)

Maximum file size: 2 GB | Allowed file types: XLSX

Open the worksheet and complete it as per the instructions at the top.

Only complete the tab identified by your advisor in the email.

Save and rename it with this naming format:

File number_Deliverable_Worksheet_Applicant ie. CDF-2-1001_Deliverable_Worksheet_Applicant

Note: The final payment tab in the worksheet must be printed, signed and uploaded into a drop box. Before it is signed, email the spreadsheet to your advisor for review.

File number: Applicant name: Project name: Project start date (YY/MM/DD): Project end date (YY/MM/DD):

Instructions

- In the 'Forecasted budget or budget spent to date' table, enter the total amount of money you've spent or expect to spend on each budget item listed in column A. Do this for all expenses that occurred or will occur. The 'Forecasted spend' in column P should equal the 'Budget subtotal' amount listed in column F.
- The first payment amount will be calculated automatically. Your advisor will review it before approval. Talk to your advisor if you think there are any errors.
- At the bottom of the sheet in the "Monthly activities" table, write a brief description of the activities related to the project on a monthly basis. The months must correspond to the months you entered expenses.

Contact your advisor if you need help or have any questions.

Budget from TPA					
Budget item	CDF contribution	Proponent cash contribution	Proponent in-kind contribution	Other	Budget subtotal
TOTAL					

	Jan-00	Jan-00	Feb-00

Payment schedule			
First payment	up to		\$ -
Interim payment	up to		\$ -
Interim payment 2	up to		\$ -
Final payment	up to	0%	\$ -

First payment amount: \$

Monthly activities: Brief description of the activities being carried out in that month that will incur the month's expenses.

Month	Activity
Jan-00	
Jan-00	
Feb-00	
Mar-00	
Apr-00	
May-00	
Jun-00	

Navigation: First Payment | Interim Payment | Interim Payment 2 | Final Payment | +

Upload the requested deliverable items in the applicable drop box and click "Submit".

DELIVERABLES

*** Upload - Forecasted budget**

Download the document below by clicking on the filename. Once completed, upload the finalized version in the "Financials" upload field provided.

[CDF-2-1001_Deliverable_Worksheet.xlsx](#)

*** Upload - Financials**

Re-upload the completed forecasted budget document below.

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

File Name

CDF-2-1001_Deliverable_Worksheet_Applicant.xlsx

*** Upload - Invoice**

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

File Name

If you have questions about the requested deliverables, leave a note for your advisor. For instructions, refer to **5.0 Notes**.

You will receive an email, from noreply@smartsimplemailer.com with the subject line "Deliverables Received" confirming your submission has been received.

Your advisor will review the documents.

You will be notified if revisions are required (Refer to **9.0 Revision requests**).

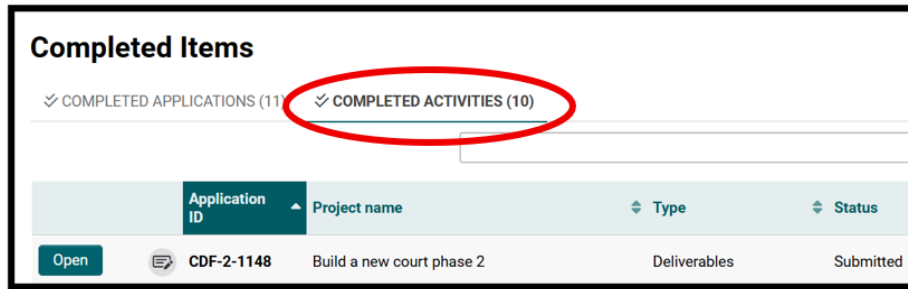


12.3 Deliverable accepted

If the submission is complete and the deliverables are accepted, the advisor will proceed to payment.

This process applies to all payment and reporting stages, including initial, interim and final.

You can find records of your submission under “Completed Items”, then “Completed Activities”.



13.0 Amendment

If you require changes to your Transfer Payment Agreement, contact the advisor by leaving a note. Refer to **5.0 Notes** for instructions.

13.1 Receiving the amendment

If your request is approved, the advisor will prepare an amendment.

When the amendment is ready for review and signature, you will receive an email from noreply@smartsimplemailer.com with the subject line “Amendment is ready for your signature”.

The email will instruct you to click on the link in the email to log in and open your application.

After you are logged in, look under “Action Items”, “Activities” to open the file.

The document type is “Amendment”.

Open the applicable task.

#	Due date	Application ID	Project name	Type
1	[edit icon]	CDF-2-1148	Build a new court phase 2	Amendment

Click “Preview Amendment” to download the amendment.

Review the new schedules, if applicable.

AMENDMENT

[Preview Amendment](#)

New Schedules

Amended Schedules

[Download](#)

File Name ^

[NEW_SCHEDULE_A.docx](#)

* Copy signed by organization

1. Click on Preview Amendment button to download the amendment;
2. Review the new schedules, if applicable;
3. Sign the amendment;
4. Upload the signed amendment;
5. Click submit.

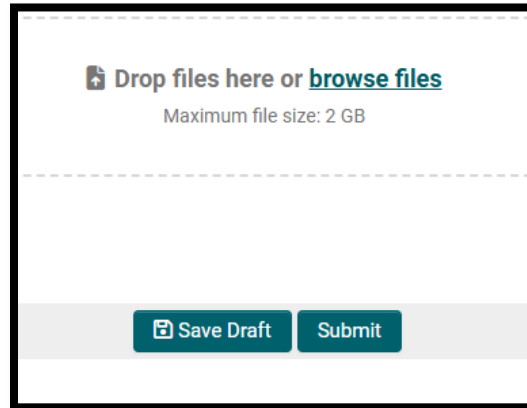
Drop files here or [browse files](#)
Maximum file size: 2 GB

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



13.2 Submitting the amendment

After you have reviewed, printed and signed the amendment, upload and save it in drop box and click “Submit.”



13.3 Amendment accepted

When your amendment has been countersigned, you will receive an email from noreply@smartsimplemailer.com, with instructions on next steps.

You can find a record of your submission under “Completed Items”, then “Completed Activities”.

