**COMMUNICATION LOG**

Track all communications and house documents in SmartGrant

**SENDING EMAILS**

* In SmartGrant, select relevant award
* On the top menu, select “Communications”



* A pop-up box will open, select “Add”



* In the communication pop-up, complete the following:
	+ Subject:
	+ Medium: select “Email”
	+ Type:
	+ Email Source: leave blank
	+ Public/Private: “Public”
	+ Send Email: select the box, then click on the person icon
		- You will be prompted to choose from auto-populated lists based on the PIs department chair, dean, or co-PIs
		- Select recipients to send email to, including CC and BCC options
	+ Attachments: click on the paperclip icon to choose attachments to send
	+ Communication Text: type personalized note. **Important** — include instructions for email recipients to respond directly to the original email. This ensures communications are logged within SmartGrant, without having to upload emails, notes or other files.
		- *Suggested text:* To submit, reply directly to this email with completed forms attached.
	+ Update



**ADDING NOTES**

* In SmartGrant, select relevant award
* On the top menu, select “Communications”



* A pop-up box will open, select “Add”



* In the communication pop-up, complete the following:
	+ Subject:
	+ Medium: select “Note to File”
	+ Type:
	+ Email Source: leave blank
	+ Public/Private: “Public”
	+ Send Email: leave blank
	+ Attachments: click on the paperclip icon to choose attachments to send
	+ Communication Text: type personalized note.
* Update



**VIEWING COMMUNICATIONS**

* In SmartGrant, select relevant award
* On the top menu, select “Communications”



* Select “Edit” icon on left of communication to open, view attachments, print, or delete

