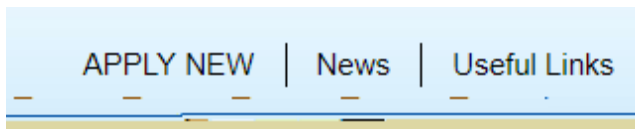


How to Submit an Application Form

Login to the portal through the appropriate link.

1. [Internal User \(Dalhousie NetID\)](#)
2. [External User](#)

On the right side of the homepage, click Apply New.



Under **51P10V01\$ - !X10\$0 1Q\$ /P1Q01P E011P0**, select the relevant form.

Dalhousie - Awards and Clinical Trials

Application Name	!
Investigator Checklist - Funding Application/Agreement	I
Investigator Checklist - Non-Funding Agreement	I

The form includes a series of tabs at the top.

Locate the relevant file, and open with the **View** button. The View button is read-only mode and will not allow you to save changes.

	File No	Project Title
View	Edit	Clone
Delete	Latest workflow	Latest workflow

Basic details are captured under the **Project info** tab, including Project Title, Start and End Dates (these dates can be estimated if not finalized yet), and Keywords relevant to the project.

Project info | Project team info | Project sponsor info

Title *

Keywords:

Farther down the page are a series of questions where a “yes” response can be given where applicable.

Research at Dalhousie? : ☐ Yes
☐ N/A

Research at NSHA? : ☐ Yes
☐ N/A

Research at DMNB? : ☐ Yes
☐ N/A

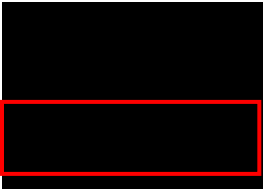
The PI can also link a Certificate file to the application. Clicking Search will generate a list of the PI’s Human Ethics and Animal Ethics protocols in the system.

Related Certifications

- Click Search to attach an ex

Search Add Ne

Click Search Profiles.



Search the name. If nothing appears, try the first or last name separately (name might include hyphens, initials, etc.)

☐ Start With

☒ Any part

Last Name:

First Name:

Search

Reset

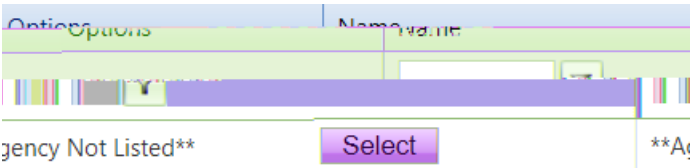
Click the Select button.

Options	Last Name
Select	Training

The team member's profile details will auto-populate. The drop-down list can be used to select their role in the project.

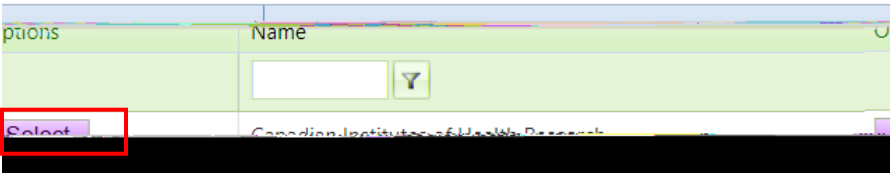
Role In Project:	Applicant
Position:	Professor

b00\$: If the agency is not listed, select the Agency Not Listed option. Type the agency name in the comment box provided.



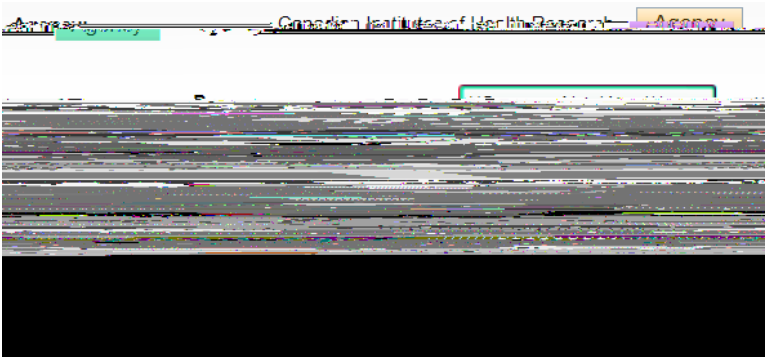
A screenshot of a web form. At the top, there are two tabs labeled 'Options' and 'Name'. Below the 'Options' tab, there is a dropdown menu with a downward arrow icon. To the right of the dropdown menu is a purple button labeled 'Select'. Below the dropdown menu, the text 'Agency Not Listed**' is visible. To the right of this text, there is a comment box with the placeholder text '**A'.

If the agency appears, click the Select button.



A screenshot of a web form. At the top, there are two tabs labeled 'Options' and 'Name'. Below the 'Options' tab, there is a dropdown menu with a downward arrow icon. To the right of the dropdown menu is a purple button labeled 'Select'. Below the dropdown menu, the text 'Canadian Institutes of Health Research' is visible. The 'Select' button is highlighted with a red rectangle.

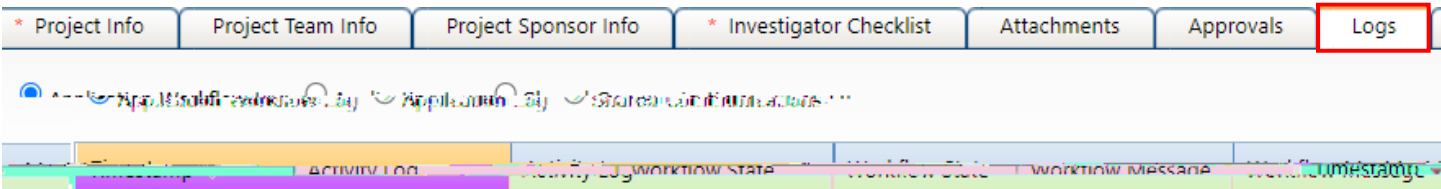
Select the program from the drop-down list. Names are arranged in alphabetical order.



A screenshot of a web form. At the top, there are two tabs labeled 'Agency' and 'Program'. Below the 'Agency' tab, there is a dropdown menu with a downward arrow icon. To the right of the dropdown menu is a purple button labeled 'Agency'. Below the dropdown menu, the text 'Canadian Institutes of Health Research' is visible. The 'Agency' button is highlighted with a red rectangle.

If applicable, enter the Competition Date (funder deadline). The Start and End Dates can be estimated

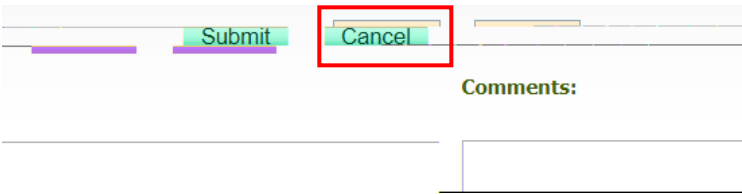
The **Logs** tab will automatically track changes to the file made overtime, as well as messages shared between signing authorities, researchers, and administrators.



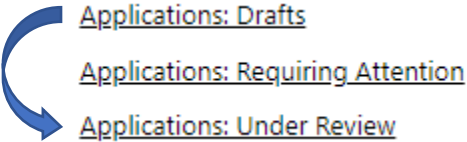
When the application is ready to submit, click the Submit button. **Note:** Only the Principal Investigator can see the Submit button, since it's the equivalent of their electronic signature.



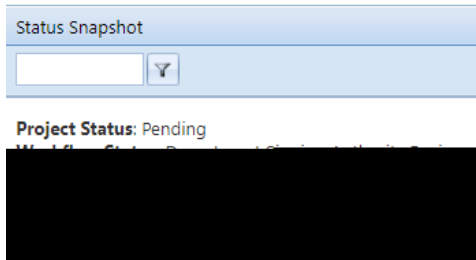
A pop-up box will appear. Add any comments to share with the signing authorities and/or office administrators, then click Submit again.



Upon submission, the file will move from **Applications: Drafts** to **Applications: Under Review**. At this point, no edits can be made, and the file will be read-only.

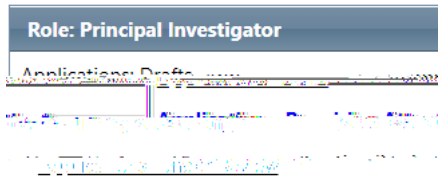


If the PI needs to make revisions, the Status Snapshot will display where the application is currently sitting. The Signing Authority or ORS/OCIE Administrator can return the application for revision.



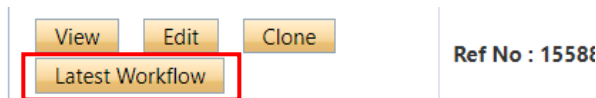
The image shows a 'Status Snapshot' form. It has a header bar with the text 'Status Snapshot'. Below the header is a search bar with a dropdown arrow. Underneath the search bar, the text 'Project Status: Pending' is visible. The rest of the form is obscured by a black redaction box.

If revisions are required, the PI and project team members will receive an automatic email notification. Login to the portal and click ! μμρ0ί1ύ00Ωσ w\$ξЙ0o0Ω° ! ύύ\$Ω000Ω.



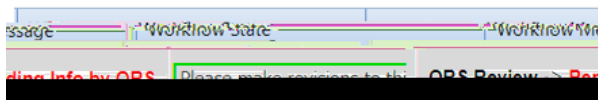
The image shows a user interface with a header bar that says 'Role: Principal Investigator'. Below the header, there is a section titled 'Applications: Drafts' which contains a list of application entries. The list is partially obscured by a black redaction box.

Click Latest Workflow next to the project.



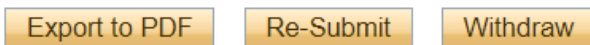
The image shows a set of buttons for workflow management. There are three buttons in the top row: 'View', 'Edit', and 'Clone'. Below them is a button labeled 'Latest Workflow', which is highlighted with a red rectangular border. To the right of these buttons, the text 'Ref No : 15586' is visible.

View the message from the signing authority or ORS/OCIE Administrator.



The image shows a message box or notification area. It contains text that is partially obscured by a black redaction box. The visible text includes 'ding Info by ORS' and 'Please make revisions to the ORS Review > Res'.

Make the required changes. As the final step, the PI clicks the Re-Submit button.



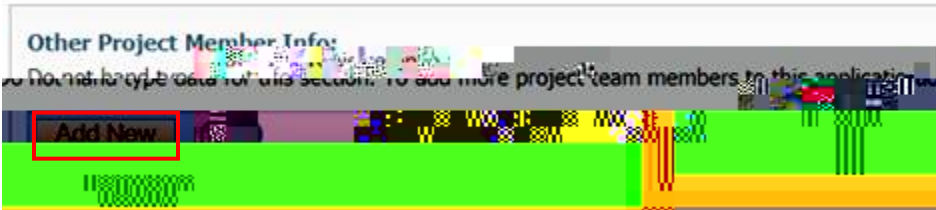
The image shows three buttons arranged horizontally: 'Export to PDF', 'Re-Submit', and 'Withdraw'. The 'Re-Submit' button is the one mentioned in the text as the final step.

How to Change the Principal Investigator in a Draft File

The person who starts the checklist is automatically listed as

To save their work, and still have access to the file, the delegate needs to add themselves back in as a Project Team Member (scroll to the bottom of the Project Team Info tab).

Click Add New.



Click Search Profiles to look up and select their name.



Save and close out of the file. When the application is ready to be submitted, the team member can inform the PI. The PI can open the draft application with the 9S button and click the {ЙōУ button.