







| SHRF RMS Manual

Effective January 2024

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Using the System

Saskatchewan Health Research Foundation (SHRF) uses an integrated online research management system by SmartSimple. We continue to improve and update our online system to deliver an efficient process at all stages of the Grant Life Cycle. To continue supporting our users, we have developed this manual to navigate the SHRF Research Management System (RMS)

The instructions in this document pertain directly to the SHRF RMS. Information pertaining to eligibility, funding requirements and the application are found in the SHRF Funding Guide and relevant Application Package. These documents should be read before completing an application to any of our funding opportunities.

This manual will be updated regularly to reflect system changes, so please access the manual directly from shrf.ca/resources or in the [SHRF RMS](#) on your home page under Reference Documents.

Browsers currently supported by the SmartSimple platform are listed [here](#). We have found Chrome works best.

SmartSimple performs system-wide upgrades and backups at 01:00 a.m. EST each night, so you may experience slowness or difficulties around this time.

The SHRF RMS can be accessed at shrf.smartsimple.ca or through the links at shrf.ca. SHRF welcomes suggestions for improving the system or this manual.

Support

If you need assistance of any kind, please do not hesitate to contact SHRF and we will make every effort to respond as soon as possible.

General email: helpdesk@shrf.ca

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Accessing the SHRF RMS

The SHRF RMS can be accessed at shrf.smartsimple.ca or through the links at shrf.ca.

NOTE: You will be automatically logged out after 60 minutes of inactivity – ensure your session is valid before entering information.

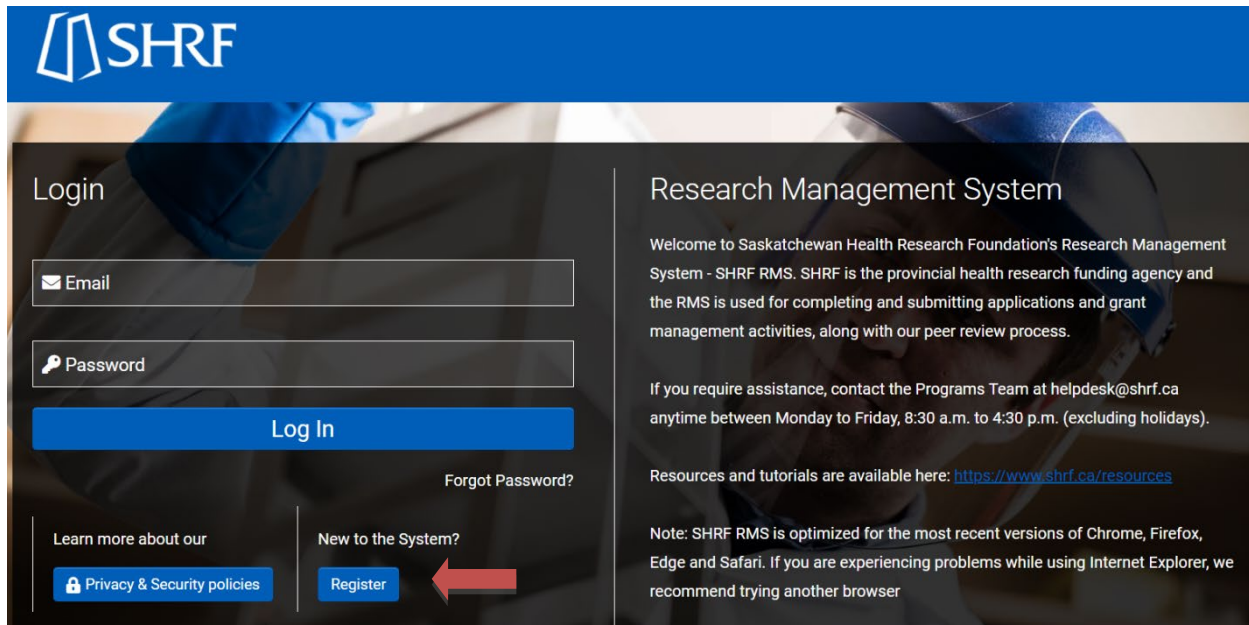
Cookies, Privacy & Security Policies

New users will be asked to accept SHRF’s Cookies Policy before proceeding forward.

Returning users may be asked to do the same if it’s their first time using the new system. If you would like to know more about our Privacy & Security Policies, you can download the document on the login page by clicking the “Privacy & Security policies” or on your home page once you are logged in to the RMS.

New User – Registering a Profile ([Watch the video](#) )

When on the SHRF login page, you will click the “Register” button found under the “New to the System”.



SHRF

Login

Email

Password

Log In

Forgot Password?

Learn more about our

Privacy & Security policies

New to the System?

Register

Research Management System

Welcome to Saskatchewan Health Research Foundation's Research Management System - SHRF RMS. SHRF is the provincial health research funding agency and the RMS is used for completing and submitting applications and grant management activities, along with our peer review process.

If you require assistance, contact the Programs Team at helpdesk@shrf.ca anytime between Monday to Friday, 8:30 a.m. to 4:30 p.m. (excluding holidays).

Resources and tutorials are available here: <https://www.shrf.ca/resources>

Note: SHRF RMS is optimized for the most recent versions of Chrome, Firefox, Edge and Safari. If you are experiencing problems while using Internet Explorer, we recommend trying another browser

This will take you to the “Registration Organization Options” page where you will choose which organization type is your primary organization. **NOTE:** Later on, you will be able to register other affiliations. This stage is to just pick the organization that you are primarily affiliated with.

Registration Organization Options

Read the descriptions below and select the registration category that matches your primary affiliation. You can add other affiliations after registering and completing your personal profile.

SHRF MOU Research Organization

Click here if you are affiliated with one of these organizations: **Parkland College; Saskatchewan Health Authority; Saskatchewan Polytechnic; St. Thomas More College; University of Regina; and University of Saskatchewan**

Canadian Non-profit Organization

Click here if you are affiliated with a Canadian Non-profit Organization. Please note, funding opportunities will be limited based on organization eligibility requirements. For other funding opportunities you will have access to applications once invited by the Principal Applicant.

Other Organization

Click here if you are affiliated with an organization that is not a SHRF MOU Research Organization or Canadian Non-profit organization. Please note, you will not have access to apply to SHRF funding opportunities. You will have access to applications once invited by the Principal Applicant.

Individual

Click here if you have no organizational affiliation and are registering as an individual. Please note, you will not have access to apply to SHRF funding opportunities. You will have access to applications once invited by the Principal Applicant.

Below are further instructions on each of the organization types registration process and then next steps on completing registration once you have picked your organization.

[Registering with SHRF MOU Research Organization](#)

Organizations that currently have a MOU with SHRF are:

- First Nations University of Canada
- Suncrest College
- Saskatchewan Health Authority
- Saskatchewan Polytechnic
- St. Thomas More College
- University of Regina
- University of Saskatchewan

If your primary affiliation is with one of these organizations, click the “SHRF MOU Research Organization” button. You will then be directed to the registration page where you will first be asked to identify the main organization you are affiliated with. For the “Organization Name” begin typing in the full proper organization name. A dropdown should appear, where you can click on the appropriate Organization and continue with your registration.

SHRF MOU Research Organization Registration



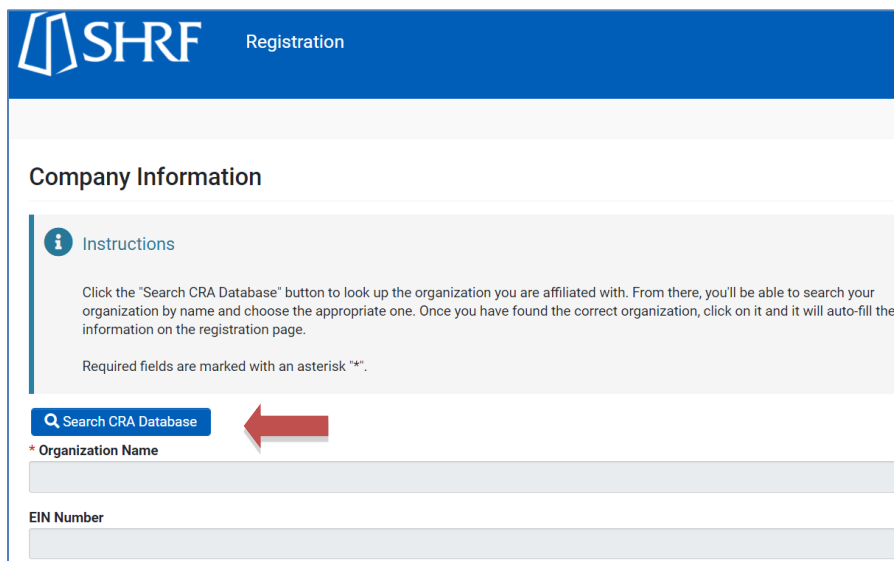
To create a profile in SHRF's Research Management System, enter the information below (please use proper capitalization and punctuation).

Institution/Organization: Start typing the full name of your institution/organization (Please Note: the following institutions have a MOU with SHRF: Parkland College; Saskatchewan Health Authority; Saskatchewan Polytechnic; St. Thomas More College; University of Regina; and University of Saskatchewan). Click on the name when it appears in the drop-down list. Check to make sure you're using full names, proper spelling and grammar. If you have any issues please email helpdesk@shrf.ca

* Organization Name 

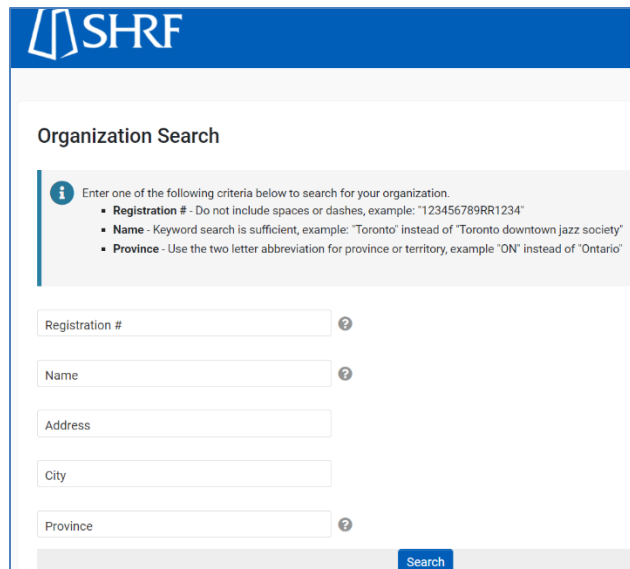
Registering with Canadian Non-Profit Organization

If you are primarily affiliated with a 'Canadian Non-profit Organization', you will click on this option, where a new window will pop up. Click on the 'Search CRA Database' button to search for your organization. **NOTE:** You will not be able to type in the organization in the "Organization Field" and must search through the CRA database.



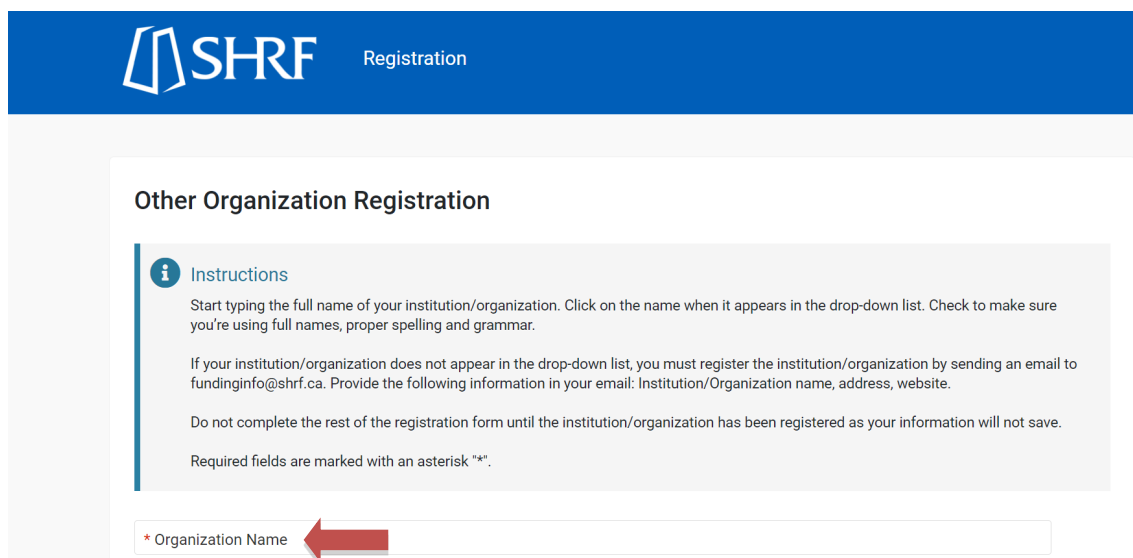
The screenshot shows the SHRF Registration page. At the top, there is a blue header with the SHRF logo and the word "Registration". Below the header is a section titled "Company Information". Inside this section, there is an "Instructions" box with an information icon. The instructions state: "Click the 'Search CRA Database' button to look up the organization you are affiliated with. From there, you'll be able to search your organization by name and choose the appropriate one. Once you have found the correct organization, click on it and it will auto-fill the information on the registration page." Below the instructions, there is a "Required fields are marked with an asterisk **" note. At the bottom of the form, there is a blue button labeled "Search CRA Database" with a magnifying glass icon. A red arrow points to this button. Below the button is a text input field labeled "* Organization Name". Below that is another text input field labeled "EIN Number".

Once you click the "Search CRA Database" a new window will appear. There are a few ways to search the database: Registration #; Name; Address; City; and/or Province. Fill in the appropriate information that you know (we suggested Name and Province to narrow down the search) and click the "Search" button. **NOTE:** For the Province field, only put the two initials and do not type the full province name. Once you find the organization in the database click on it and it will fill in the organization name on the primary registration window, along with the EIN Number.



Registering with Other Organization

If you are primarily affiliated with an organization that does not fit in either the SHRF MOU Research Organization or the Canadian Non-profit Organization, then you will click this option. You will then be directed to the registration page where you will be asked to identify the main organization that you are affiliated with. For the “Organization Name” begin typing in the full proper organization name. A dropdown should appear, where you can click on the appropriate Organization and continue with your registration.



NOTE: If the organization does not appear, it will need to be registered in the system. You will need to leave the registration process and email SHRF at helpdesk@shrf.ca letting us know that an organization needs to be registered. Then send us the following information:

- Organization Name (Full name, no acronyms)
- Organization Website
- Organization Address

Once this is received, SHRF will register the organization and let you know when it is available. You will then be able to go start the registration process and complete it.


Registering as an Individual

If you have no primary affiliation, you will click this option. You will then be directed to the registration page but will see that there is no spot to fill in an organization. Proceed to completing the rest of the requested information, which you can find below in the “Completing Registration” section of this manual.

Completing Registration

After you have chosen your primary organization type and completed the steps of adding it to your profile, you can then complete the rest of the required fields, which are marked with a red asterisk (*). Once you have completed all required fields, click the “Submit” button. The system will validate all fields and notify you if something is not complete.


Contact Information

 Please note after completing the first step of registering you are required to complete the rest of your profile which will be accessible in the system once logged in.


* First Name

Middle Name

* Last Name


* Email
 

* Confirm Email

* Phone
 

Position/Title

Once the submission is successful, you will get a registration successful message letting you know that your username has been emailed to you and next steps for setting your password. This may take a few minutes, but if you do not receive the email please check your spam filter settings or junk email folder before contacting helpdesk@shrf.ca. Once you receive the email click on the link provided to complete the registration process (i.e. create your password).



Registration Successful

Thank you for registering, your username and password will be emailed to you. If you don't receive the email shortly please check your spam filter setting or junk email folder. If you still haven't received an email, please contact SHRF at helpdesk@shrf.ca.

By clicking on the email link, an Account Activation window will pop up where you will be able to create and confirm your new password. Please be aware of SHRF's new policies regarding password creation, which will be listed directly below the password fields.


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


I'm not a robot  reCAPTCHA
Privacy - Terms

After completing this final step, you have successfully registered in the RMS and will have access to the Home page.

Previous User – Logging In

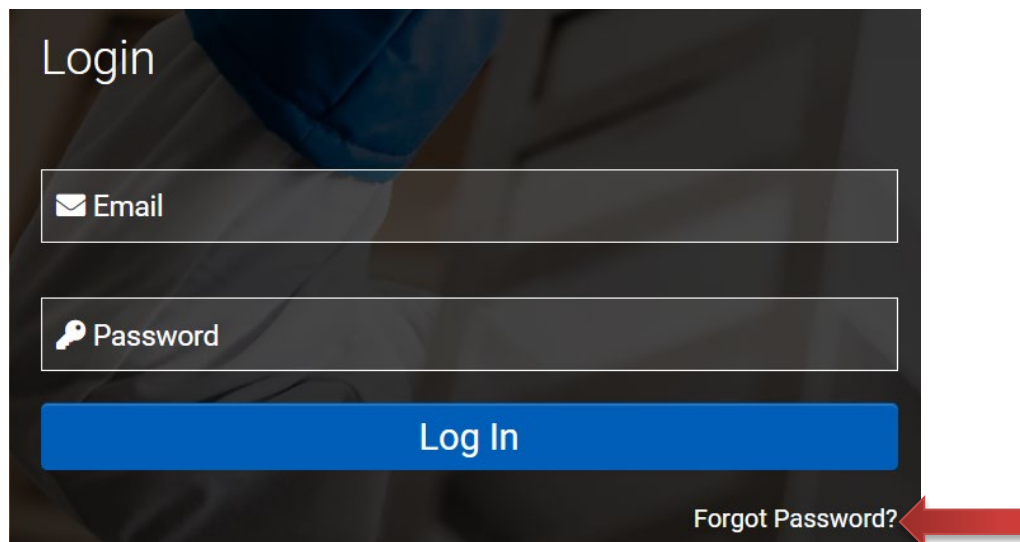
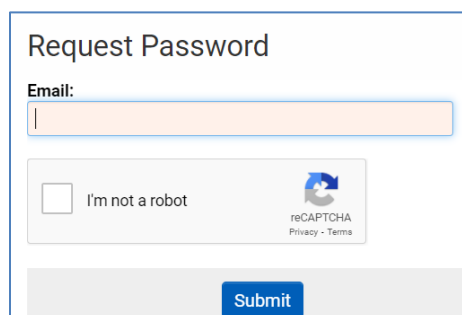
If you were a previous user in the SHRF RMS, your profile and its information has been migrated to the new system. SHRF has updated the password security measures, which means that previous users will need to reset their password the first time they go to log in. Once in the system, please review your Personal Profile and other information to make sure it is correct.

If you are unsure if you have an account in the SHRF RMS, click the “Register” button, type in your email address and the system will tell you if that email address already exists in the system. If that is the case, please follow the steps below to reset your password to get back into the system. If you do not have a profile in the system, please follow the [New User – Registering a Profile](#) steps to register a new profile.

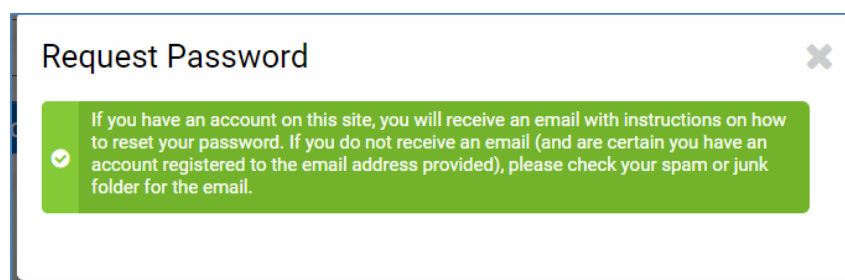
 **Alert**

A user matching the information you entered already exists. Please contact your system administrator or use the forgot your password.

On the Login page below the “Log In” button, you will see a “Forgot Password?” button. Click this button to open a new window, where you can enter your email address that you use to log in.

Once you have completed the required information, click the “Submit” button. A message will appear letting you know an email has been sent with instructions on [how to reset your password](#). 📧



The email may take a few minutes to appear. Once you do receive it, you will get the following message:

“You are receiving this email because you forgot your password for the Saskatchewan Health Research Foundation’s online research management system – SHRF RMS. If you did not request a forgot your password, please ignore this email.

Your user name is ... please click on the link below to create a new password: [link here](#).

If you encounter any problems, please email helpdesk@shrf.ca.

Thank you,

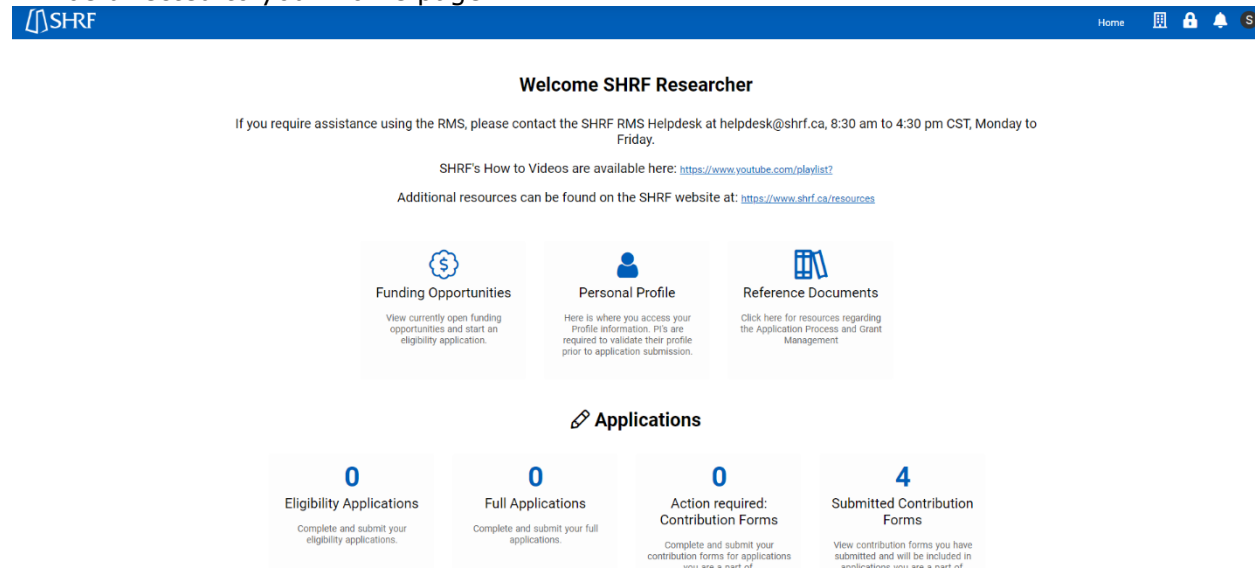
SHRF Programs Team”

After clicking the email link, you will be taken to the Account Activation page where you will fill in your new password. Follow the instructions on the window and make sure your new password meets SHRF’s new password policy. After this is complete, you will now be able to successfully enter the SHRF RMS.

Navigating the SHRF RMS

Home Page ([Watch the video](#) )

After you have completed the registration steps, or you have updated your password, you will be directed to your Home page.



The screenshot shows the SHRF RMS Home Page. At the top is a blue navigation bar with the SHRF logo on the left and icons for Home, a grid, a padlock, a bell, and a user profile on the right. Below the navigation bar is a white main content area. It starts with a 'Welcome SHRF Researcher' heading. A message states: 'If you require assistance using the RMS, please contact the SHRF RMS Helpdesk at helpdesk@shrf.ca, 8:30 am to 4:30 pm CST, Monday to Friday.' Below this, it says 'SHRF's How to Videos are available here: [https://www.youtube.com/playlist?](https://www.youtube.com/playlist?list=PL1234567890)' and 'Additional resources can be found on the SHRF website at: <https://www.shrf.ca/resources>'. There are three main sections: 'Funding Opportunities' with a dollar sign icon and text 'View currently open funding opportunities and start an eligibility application.'; 'Personal Profile' with a person icon and text 'Here is where you access your Profile Information. PIs are required to validate their profile prior to application submission.'; and 'Reference Documents' with a book icon and text 'Click here for resources regarding the Application Process and Grant Management'. Below these is an 'Applications' section with a pencil icon. It contains four cards: 'Eligibility Applications' with a '0' and text 'Complete and submit your eligibility applications.'; 'Full Applications' with a '0' and text 'Complete and submit your full applications.'; 'Action required: Contribution Forms' with a '0' and text 'Complete and submit your contribution forms for applications you see a part of'; and 'Submitted Contribution Forms' with a '4' and text 'View contribution forms you have submitted and will be included in applications you see a part of'.

The Home page is broken down into the top navigation bar and three sections with different icons under each:

- **Navigation Bar**
 - *SHRF Logo and Home Button*
 - *Building Icon*
 - *Padlock Icon*
 - *Bell Icon*
 - *Initials*
- **Welcome**
 - *Funding Opportunities*
 - *Personal Profile*
 - *Reference Documents*
- **Applications**
 - *Eligibility Applications*
 - *Full Applications*
 - *Action required: Contribution Forms*
 - *Submitted Contribution Forms*
 - *Results*
 - *Grant Authorization*
- **Grant Management**
 - *Reports*
 - *Change Requests*
 - *Approved*

Below is information for each of sections and the corresponding icons.

Navigation Bar

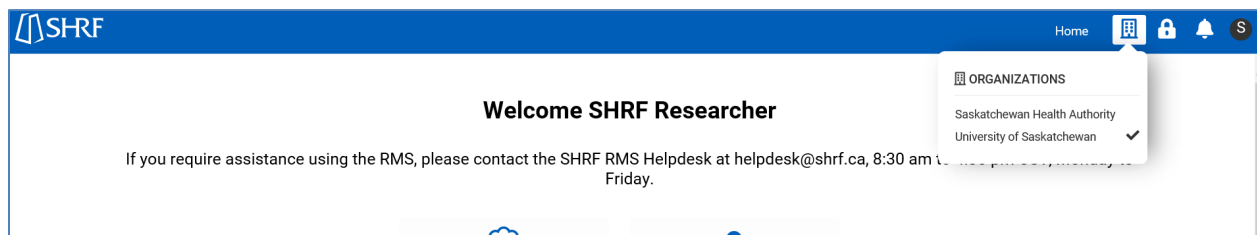
SHRF Logo and Home Buttons

By clicking either the “SHRF Logo” or the “Home” button, this will take you back to the Home page no matter where you are in the system. The system may prompt you to save your work prior to going back to the Home page but remember to do this anyway.

The Building Icon

With the new system, you can now be affiliated to more than one Organization on a single profile. What this means is if you have a position at a Saskatchewan University and you have a position in the SHA, you can now easily choose where you want the funding held based on the funding opportunity.

To add another organization to your profile please see the [Associations](#) instructions. Once you have the organizations added, you can go to the home page and click on the Building Icon, where a drop-down list will appear.



IMPORTANT: Prior to opening an application, you must first confirm your organization. To do this, make sure you are on the Home page. Click on the Building Icon and then click on the organization where you would like the funding to be held, if successful. The page will then reload and if you look at the drop-down again, you will see a checkmark beside the chosen organization. If this is correct, you can then proceed with opening an application.

Padlock Icon

This is where you can access SHRF’s Privacy & Security Policies.

Bell Icon

This is where you may see notifications from SHRF. Currently, we are not using this functionality.

Initials

When you click on your initials, a drop down will appear, showing many of the icons and buttons under the Welcome section of the home page.

Welcome



The Welcome section is where you will find information regarding SHRF’s Funding Opportunities that are currently open, access to your Personal Profile and Reference Documents that will help you navigate the RMS and complete applications.

Funding Opportunities ([Watch the video](#))

The Funding Opportunities page gives you a list view of current funding opportunities that are open and you may be eligible for. Please remember that what you see for funding opportunities depends on the primary Organization you are affiliated with (i.e. SHRF MOU’s will see more funding opportunities vs. Canadian Non-Profit, based on SHRF eligibility).


requirements). To see a full list of current funding opportunities, both open and closed, you can visit our Funding Opportunities page at shrf.ca/Opportunities.

Funding Opportunities

Opportunity Details	Grant Type	Eligibility Submission Deadline	Full Application Submission Deadline	
2020-21 Solutions - Innovation Grant	Solutions Program	10/31/2020 04:30 PM	11/26/2020 04:30 PM	 Draft Application Started
2020-21 Solutions - Impact Grant	Solutions Program	10/30/2020 04:30 PM	11/26/2020 04:30 PM	 Draft Application Started
2021-22 Research Connections	Research Connections Grant	09/30/2020 04:30 PM	09/30/2020 04:30 PM	View Details

IMPORTANT: With the new system, you are now able to have one profile and be affiliated with multiple organizations. Prior to opening an application, make sure that you have the correct organization checked off. Once you open an application, the organization you have checked off will appear on the application and cannot be changed. Please see [Building Icon](#) in this manual to learn more about this. Once you have the correct organization chosen, you can open an application by clicking the “View Details” button in the list view. This will direct you to a snapshot of the funding opportunity purpose, objectives, eligibility requirements, funding information and a link to the full Application Package. If the information still pertains to you, click the “Proceed” button to move forward with the application. To see more information on how to complete an application, jump to [Applying for Funding in the System](#).

New Application

 **Instructions:** Before proceeding to eligibility please make sure you have chosen the correct Organization where the funding will be held for this application, if successful. Please click on the building icon in the top right corner to choose the correct Organization. Once your Organization is confirmed please read the information below to make sure you are eligible for this funding opportunity.

Purpose: The Research Connections Grant supports short-term, targeted, human health research knowledge mobilization (KMb) initiatives taking place in, and having a practical application for, Saskatchewan knowledge users.

Objectives:

1. Support innovative, far-reaching and impactful KMb initiatives to take place in Saskatchewan in the form of outreach activities;
2. Advance the understanding and practice of effective KMb initiatives in Saskatchewan by supporting the innovative use of research evidence in decision making and practice;
3. Facilitate the sharing, use and integration of health research knowledge; and
4. Facilitate the collaboration between communities, patients and families, decision makers, trainees, researchers and other knowledge users to advance the sharing and integration of health research knowledge through far reaching means.

Applicant Eligibility: Must be employed by an organization in Saskatchewan with an interest in health research and KMb that is eligible to administer the grant funding. Funds must be administered by an organization that either has an MOU with SHRF or is a CRA-qualified done in Saskatchewan that will provide a statement of account to SHRF.

Funding Information:
Value: May request up to \$10,000. *NOTE:* Applications must have equivalent or great matching amounts. See Application Package for more detail regarding this.
Duration: Up to one year

For more information please download the [Application Package](#).

[Proceed](#)

Personal Profile [\(Watch the video](#))

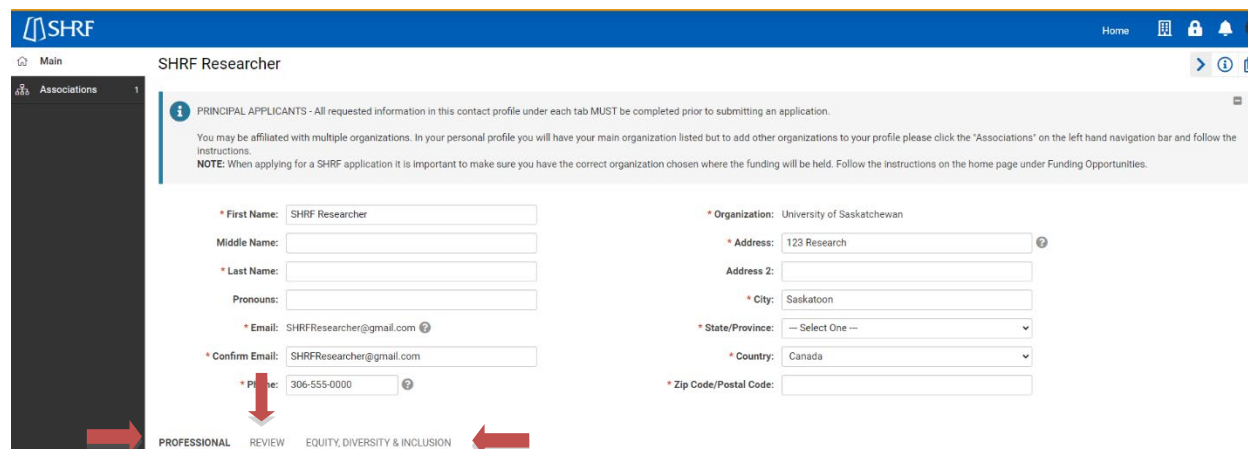
Completing a Personal Profile is an important step in using the SHRF RMS. It is also now a requirement for Principal Investigators prior to submitting an application to SHRF. Most of the information will be only visible to you and specific SHRF staff, but there are some fields that will be used to auto-fill application fields (i.e. Name, Organization). Contact information should always be up to date as SHRF staff uses this information regularly to stay in touch with you. Below are the steps on how to complete your Personal Profile.

After completing registration and logging in to the RMS you can access your Personal Profile from the Welcome section of the Home Page or in the top right corner by clicking on you initial and then choosing Personal Profile from the drop down.

In your profile, there is the general Contact Information, which sits outside of the tabs and includes mostly contact information. For the Organization listed here, that is your primary Organization that you registered with when you first created your profile. If you ever need to change your primary Organization, please contact helpdesk@shrf.ca, as a SHRF staff member will need to do this for you. All mandatory fields will have a red asterisk (*) in front of the field.

Below your Contact Information are three tabs:

- **Professional** – This section includes fields for all possible roles/positions you may have that would pertain to applying for applications. There are also fields in this section related to your online and social media presence that would be used by our Engagement team.
- **Review** – This section includes an overview of SHRF’s Peer Review and asks if you would be interested in reviewing for SHRF. If you are interested, questions will appear that are specific to your research and/or health background that would be important for being a reviewer for SHRF.
- **Equity, Diversity & Inclusion** – SHRF has created a questionnaire based on the updated CIHR EDI questionnaire. This information will be used only internally by SHRF and is for us to get a better understanding of who our applicants and reviewers are.



At the bottom of the page are two buttons: “Save Draft” and “Save”. If you need to leave the page and don’t have time to complete all required fields, you can click “Save Draft” and come back another time to complete your profile. Once your profile is complete, click the “Save” button. The system will then validate that all fields are complete. If there are missing fields, the system will notify you, otherwise your Profile will be considered complete. You can come back at any time though and update information if something changes.

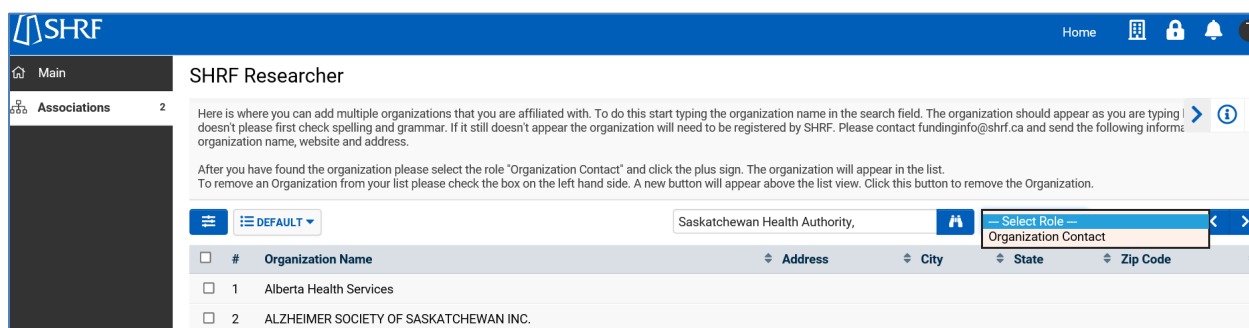
Associations

The system can now accommodate individuals who may be affiliated with multiple organizations that. In your Personal Profile you will have your primary organization listed on the Main page, but you can now add other organizations under the “Associations” button on the left menu bar.

NOTE: When applying to a SHRF funding opportunity, it is important that you have the correct Organization checked off before opening the application. Please see [Building Icon](#) section for more information.

To add other organizations to your profile, click the “Associations” button found in the left-hand navigation bar in your Personal Profile. Start typing the organization name in the search field (beside the binoculars icon). The organization should appear as you are typing. If it does not appear, first check to make sure you have the proper name. If it still isn’t showing, the organization isn’t registered in the RMS, so you will need to contact SHRF. Email helpdesk@shrf.ca and send the following information: organization name, website and address. SHRF will then confirm with you when the organization has been registered in the system.

After you have found the organization please select the role “Organization Contact” and then click the “+” button to add the organization to your list. To remove an organization from your list please check the box on the left-hand side beside the one you wish to remove. A “Trash Can” button will appear above the list view. Click this button to remove the organization.



Reference Documents

The Reference Documents page will have helpful information for you regarding how to use the SHRF RMS and for completing applications.

Applications

This section is where any of your applications to SHRF, as either a Principal Applicant or in another Project Role, will live from the eligibility stage to results. As your application moves through the process, it will move into the stages of the application phase. Each icon has a number above letting you know how many applications you may have in that stage. When you click on an icon, it will open a page with a list view of your applications. Below is information regarding each icon and what you will find in it.

Eligibility Applications ([Watch the video](#) 🎥)

This is where you will find your applications that are at the eligibility stage, which includes: Eligibility Draft; Eligibility Submitted; Eligibility Revisions Required; and Eligibility Revisions Submitted. Once your eligibility check has successfully made it through this stage, it will move from this section to the Full Application.

Full Applications

This is where you will find your applications that are at the full application stage, which includes: Application Draft; Application Submitted; Application Revisions Required; and Application Revisions Submitted. This is also where the application will stay during the review process.

Action Required: Contribution Forms

With the updated system, it is now a requirement that all individuals invited to an application in a Project Role will need to complete a Contribution Form. In this section is

where you will find all of your Draft Contribution forms, letting you know what will need to be completed prior to the submission of an application.

Submitted Contributions Forms

Once your Contribution Form has been submitted, it will be moved to this section for you to view.

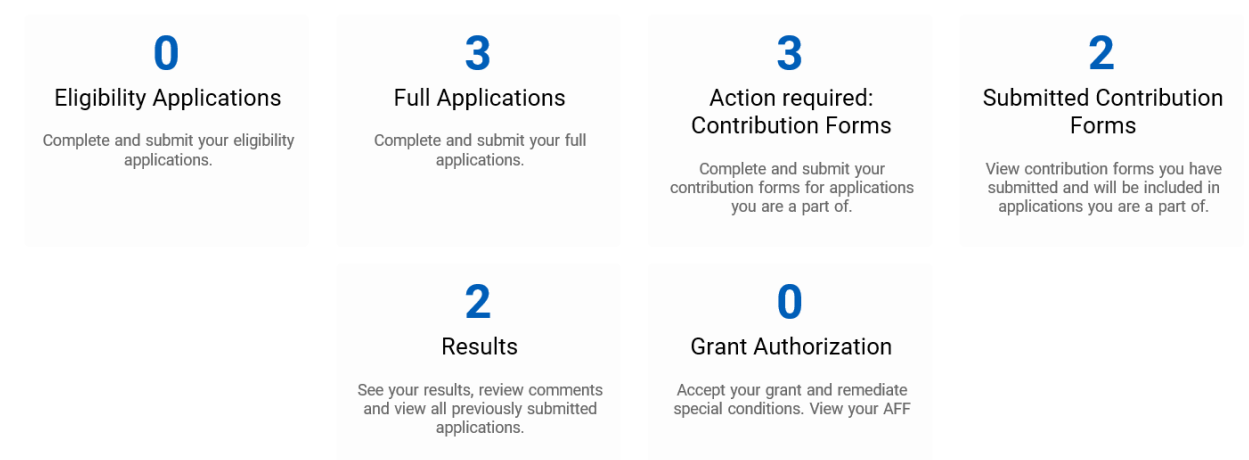
Results

This is where your application will appear once a decision is made, but usually will happen after the peer review process. This will include all results of an application, which are: Eligibility Denied; Application Denied; Offered; Funded; Not Funded; Withdrawn; On Hold; Extended; and Closed.

Grant Authorization

If successful in the funding opportunity, the application will go to Offered and documents will appear in this section that will need to be completed to authorize the grant.

Applications



Grant Management

For successfully funded applications, there will now be activities attached (i.e. progress reports). Also, there is now a new process for requesting any changes (i.e. timelines, budget, team, etc.) to the funded grant, which is in this section. Much like the Applications section, the activities also go through the different tabs as it works through the internal processes. Below is information regarding each icon and what you will find in it.

Reports

Here is where you will find a list of all reports that you will need to complete throughout the grant funding period and the different stages they are at, which includes: Draft; and Submitted. Once a report has been approved by the Program Manager, it will move into the Approved section.

Change Requests

Here is where you can submit a change request for a currently funded grant. Change requests can be sent regarding timelines, budget, people or other. The change requests will

stay in this section if they are in any of the following statuses: Draft; Submitted; Revisions Requested; and Revisions Submitted.

Approved

Here is where you can find all approved reports and change requests after they have been reviewed by the Program Manager.

Grant Management

1

Reports

View, complete and submit required grant reporting. (Draft reports can be saved prior to submitting to SHRF.)

0

Change Requests

Submit a change request for a currently funded grant.

0

Approved

Approved reports & change requests

Applying for Funding in the System

Prior to applying to a SHRF funding opportunity, please read both the SHRF Funding Guide and the specific Application Package. The Funding Guide and Application Package can be downloaded and printed as a PDF from shrf.ca.

For important information on what you need to know before accessing an application, please read the [Funding Opportunities](#) section in this manual. The information in this section will cover general RMS functionality and will not touch on specific fields for applications. For detailed information regarding the fields in an application, please read the Application Instructions found in the specific Application Package.

Application Invitations ([Watch the video](#))

It is the responsibility of the Principal Applicant to invite other individuals to the application. Please see the appropriate Application Package to find out exact team member requirements. Contacts can be invited to the application at either the eligibility or application stage but be aware of eligibility requirements. When you invite someone to the application, you will be able to assign them different Project Roles, which will then give them different permissions regarding editing the application.

To add a contact, first make sure that you have your draft eligibility or full application open. Then open the Application Details tab on the application and scroll to the header Project Roles. Here you will see three different sub-headers, along with an Envelope icon under each sub-header where you can invite contacts to the application. Below are definitions for each Project Role:

- **Applicants/Investigators** - Applicants/Investigators are individuals who contribute to the intellectual or scientific direction of the proposed work. They share responsibility for the direction of the proposed activities. They are designated as Principal Applicant, Co-Principal Applicant, or Co-Applicant based on their level of leadership, responsibility, and involvement. Individuals in these roles may be researchers, knowledge users, or people with lived experience.
- **Personnel** - Personnel (Trainees and Research Staff) are individuals tasked to carry out aspects of the research project and will be compensated from the grant funds. They do not count towards team requirements.
- **Supporters** - Supporters are individuals or organizations who provide a specific service in a limited and defined role in the proposed activities, have an interest in the research outcomes (i.e. knowledge user organization) or represent private industry. They do not count towards team requirements.
- **Grant Writer** - Grant Writers are individuals who support the Project Team in writing and pulling together the documentation for the application. They are not members of the Project Team.

APPLICATION DETAILS ELIGIBILITY PROPOSED PROJECT BUDGET ROLES APPROVALS



▼ Project Roles

Individuals can be invited to the application at both the Eligibility and Application stages as either Applicants/Investigators, Personnel or Supporters (role definitions can be found in the latest Funding Guide). It is important to review the Applicant/Team Member requirements for the funding opportunity in the appropriate Application Package so that you meet grant eligibility.

To add someone to your grant, find the Project Role that they will be holding (i.e. Applicants/Investigators) and click the envelope button. This will open a new window, where you will click the "+" button and fill in the requested information. Once you have added all members of your application for that role, click the save button and then click the invite button to send the invitation(s). Invitations will be sent by email and each person should accept or decline the invitation. It's important that all members accept their invitation in order for your eligibility application to be submitted at either eligibility or full. NOTE: The save button will not send the invitations. You will need to do these steps for each Project Role. Please contact the Programs Team if you have any questions at fundinginfo@shrf.ca.

Applicants/Investigators

Applicants/Investigators are individuals who contribute to the intellectual or scientific direction of the proposed work. They share responsibility for the direction of the proposed activities. They are designated as Principal Applicant, Co-Principal Applicant, or Co-Applicant based on their level of leadership responsibility and involvement. Individuals in these roles may be researchers, knowledge users, or people with lived experience.

 1-2 of 2 

Prefix	First Name	Last Name	Email	Role	Status
--------	------------	-----------	-------	------	--------

To add a contact, find the Project Role that they will be holding and click the Envelope icon. A new window will appear where you will click the "+" button to begin filling out the requested information. You will need to add this information for each contact you are inviting. Please note, at this stage you will not be assigning the Project Role Descriptor (i.e. researcher, knowledge user, person with lived experience) as this will happen at the Contribution Form. Also, please make sure you have the correct email address for each contact. **IMPORTANT:** If the contact has a profile in the RMS, you will need to use the email they use to sign in. Using a different email will create a new profile for them. Once you have all the information inserted, click "Save Draft" and then click "Invite". The "Save Draft" button alone will not send the invitations, as you must click on the "Invitation" button.

The invitation will then be sent to the contact through their email. In the email they can either accept or decline the invitation. Once they have completed this step, you will see their response under the appropriate sub-header in the list view in the "Status" column (if they accepted, it will say accepted, if they declined, it will say declined). **You must make sure that all invitations have been responded to prior to submitting your application. If there are invitations still left in the "Invite" stage, the system will not allow you to submit your application.**

Resending an Invitation

If a contact does not respond to the original email, or if they cannot find the invitation, you may need to resend it. Go to the appropriate Project Role sub-header and click the "Envelope" button, which will open the Invite window. In your list look for the contact whose invitation will need to be resent. Once you find them, have your cursor hover on the left side of the Prefix field, where a "Paper Airplane" icon should appear. Click this button to resend the invitation. Please note that this button will only appear if the contact's invitation is still in the "Invited" status.

Deleting a Contact

If you are wanting to remove a contact, go to the appropriate Project Role sub-header and click the "Envelope" button to open the Invite window. In your list, look for the contact you

wish to delete. Once you have found them, you will find a “X” button on the right side of their information. Click that button to remove them from the application.

Accepting an Invitation

After the Principal Applicant has sent the invitation, the invited contact will need to accept it. To do so, they will need to go in to their email where the invitation was sent and look for the email with the subject line “SHRF RMS Invitation”. The email will have the basic information regarding the grant and then a link, which you will click to open a browser window to accept or decline the invitation.

Dear Dani Researcher,

You have been invited to participate as a Co-Investigator on Tanya Skor 6041 | Jim Pattison Children's Hospital Foundation Research Grant | Committee Review Application.

Below is information on responding to the invitation depending on if you are a NEW or CURRENT user of the RMS. Please find the appropriate header below and follow the instructions. If you have any issues at anytime with the invitation, please contact helpdesk@shrf.ca.

New RMS User

If you have never been in the SHRF RMS before, you are considered a new user. Click the invitation link below to open up your browser and then accept or decline. If you accept, it will prompt you to complete the registration process to create a RMS Profile. Please follow the registration steps closely in order to complete the invitation process.

Current RMS User

Prior to clicking the invitation link below, confirm that this email address the invitation was sent to is also your login email to the RMS. IF IT IS NOT, do not click the link and email the PI to inform them to cancel the current invitation and resend it to your RMS login email. If the email address that this invitation was sent to is correct, please click the invitation link below and accept or decline the invitation. You will then have completed the invitation process.

Invitation Link

https://shrf.smartsimple.ca/ex/ex_invitation.jsp?lang=1&token=%242NNW1sR4cZqUWbvfdvP2bg92NHbxwMxbPSTqWO5Y%3D

Sincerely,

SHRF Programs Team



When the window opens, please read the Invitation information over carefully. SHRF does not have invited contacts sign a signature page anymore, with the accept/decline process filling in for that, so it is important that you read the terms of accepting the invitation over carefully. Once that is done, you will then click the “Accept” button to accept the invitation or the “Decline” button to decline the invitation.



Invitation to SHRF Grant

Hello Dani Researcher,

You have been invited to participate as a Co-Investigator on Tanya Skor 6041 | Jim Pattison Children's Hospital Foundation Research Grant | Committee Review Application.

Please accept or decline this invitation by clicking on the appropriate button below. Please note:

If you are a **New RMS User** and you agree to the listed conditions for being on the application, click the “Accept” button and then follow the steps to create a RMS Profile. If for any reason you do not want to be on the application, please click the “Decline” button, ending the invitation process.

If you are a **Current RMS User**, prior to responding to the invitation, confirm that the email address this was sent to is the same email address that you use to login to the RMS. IF IT IS NOT, decline the invitation and email the PI to let them know the correct email address that they would need to send the invitation to. If the address is correct, and you agree to the listed conditions for being on the application, click the “Accept” button below. You will now have access to the application on your Home Page. If for any reason you do not want to be on the application, please click the “Decline” button, ending the invitation process.

Invitation Acceptance Conditions

By accepting this invitation, you hereby:

- (1) agree that at the time of submission, all information provided in the application is accurate,
- (2) accept the terms and conditions for research funding as outlined in the most recent Funding Guide and relevant Application Package,
- (3) agree that any research funded by SHRF will adhere to nationally accepted ethical and safety standards, and
- (4) agree to allow SHRF to share the application with current and funding partners.



If you have accepted the invitation, one of two things will happen:

Returning User

If you are a returning RMS user (i.e. someone who has a profile in the system), you will have a window appear letting you know that you have successfully accepted or declined the invitation. You can then log in to the RMS, and if you accepted the invitation, you will see the application on your home page.

New User

If you are a new RMS user (i.e. you have never created a profile in the system) you will be directed to the registration page. You must complete registration to complete the invitation process. Please see the [New User](#) section in this manual regarding how to complete that process and set up your password. Once that is complete, when you log in to the RMS, you will have access to the application.

Editing an Application

Depending on the Project Role assigned to contacts, there may be more than one individual who has editing privileges for the application. For this system, only one person can be in the application editing at a time. As a precaution, the following functionality and messaging is in place:

- If you were first in with editing privileges, you will have this message: “You have checked out this record and have exclusive access”. This means you are the one with access to the application and can edit the work; or
- If you were not first into the application, you will have this message: “This record is locked and being edited by another user”. This means you do not have access to the application to edit.

For someone else to make edits, the contact with the current editing privileges will need to leave the application. Then everyone may need to refresh their browsers before the other person can get in. Make sure that prior to leaving your draft you click “Save Draft” so that you do not lose any information.

Application Components

Specific instructions can be found in the appropriate Application Package. For this section of the manual, there is information about components that will be found in most applications.

Attachments

The following is a general list of attachment types that you will need to provide in an application. See the Application Package for specific information in the Application Instructions section. Most attachments are required in a .pdf file format and all attachments must be formatted as identified in the SHRF Funding Guide. We recommend clearly naming attached documents for the reviewer to easily identify the information.

- Research Proposal
- Timelines
- References
- Supplementary Materials
- Budget Excel Upload (new document format, see [Budget Excel Template](#))
- Budget Justification
- Budget Documentation (i.e. quotes, contracts, etc.)

- CCVs or equivalent
- Approval Page (Previously the Signature Page)

The multiple file upload button, where available, allows for drag and drop file attachments and automatic upload. Where attachments are restricted to a single file and/or have page number restrictions, the single file upload button is present. With this function, you must browse for the file and once selected, click the "Upload" button.

Budget Excel Template

In the Budget tab under the Budget Excel Template header, you will now be able to download an excel template of the budget. To do so, click the "Budget Upload" in the information section of this header. Once downloaded, you will see in this excel there are three sheets: Budget Table; Other Contributions; and Declaration of Overlap. You'll then be able to work in each sheet, entering the amounts for each budget line that corresponds with your application. The amounts entered will round to the nearest dollar and formulas are in place to add up totals. Once you have completed inserting the information, save the template and upload it back into the system in the appropriate spot. Then click "Save Draft" at the bottom of the screen. The information in the excel template will then populate the Budget Tables right into the application. If at any time, you wish to make changes to one of these tables, fill in your working excel document, upload the edited file to the RMS, click "Save Draft" and the new information should appear in the appropriate table.

Contribution Forms ([Watch the video](#))

Each invited contact who has a role on the proposed project (exception being the Grant Writer) will need to complete a Contribution Form. Generally, this Form will request the individual's Project Role Descriptor (i.e. Researcher, Knowledge User, Person with Lived Experience), a description of responsibilities on the proposed application (this replaces the previous Team Member Description upload document), and a place to upload a SHRF Researcher CV, a Knowledge User CV, a testimonial (written or audio) or equivalent (Resources found at shrf.ca/resources). Requested information will vary between invited contacts depending on what their level of participation and project role descriptor is.

To complete the Contribution Form, everyone will need to individually login to the RMS, go to their Home page and click on "Action Required: Contribution Forms" under the Application Section. From there, they will be able to provide the requested information on the Contribution Form. **NOTE:** If you have been invited to more than one application, you will have more than one Contribution Form to complete. Please be aware of which one you are completing. Once the information is complete, the individual will click "Submit" on their form. This will upload the information into the application, which will be then be visible under the Roles tab in the application.

NOTE: Contacts should direct questions regarding Project Role Descriptors, responsibility information and other relevant questions regarding their role on the application to the Principal Investigator and/or Project Team members. Principal Investigators should be clear with all invited contacts what the application deadline is and that the Contribution Forms must be submitted prior to the deadline for the application to be submitted. For technical questions on functionality of the RMS and the Contribution Form, please contact the Programs Team at helpdesk@shrf.ca.

Revisions Required

At both the eligibility and full application stages, the Program Manger will screen the information to make sure it is all there and correct before it moves on to the next stage. If

there are revisions required, the Program Manager will make notes and will then use the new Annotation tool that will direct applicants to the specific spots that need attention.

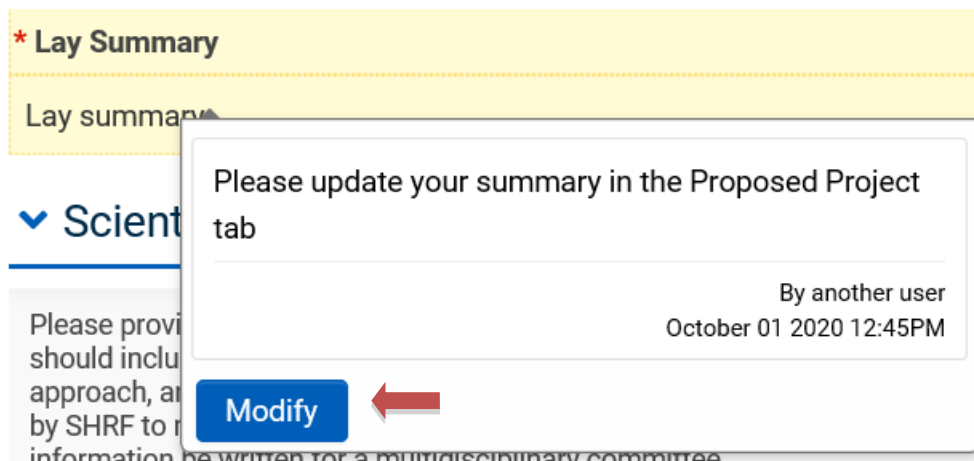
When the application is sent to Revisions Required, the Principal Investigator will receive an email notifying them of this. Please sign into the RMS and go to the appropriate section under Applications. You will then open the application where revisions have been requested. At the top of the draft you will see a message from the Program Manager letting you know what needs to be completed. You will then see in the application fields that are highlighted yellow. This is where you will need to complete a revision. Click on the field for a box to appear, which will have specific information on what needs to be updated. Then click the modify button. **IMPORTANT:** If revisions are required for a table field, you will need to click on the yellow part and not on the table button. This will then open the table so you can make changes. Once you click the modify button you will make your changes in the 'field value' box and hit save. The changes will automatically appear in that field. Once you have completed all annotations, you can click "Submit" to return the information back to the Program Manager for review. **NOTE:** At this stage, all revisions must be completed at once as there is no "Save Draft" for you to come back and do bits at a time, so please leave an appropriate amount of time to complete all annotations.

6026 | Impact Grants | Revisions Requested



Staff has requested the following revisions to your application

Please update your summary in the Proposed Project tab



* Lay Summary

Lay summary

Scientific

Please provide information that should include an approach, as requested by SHRF to be written for a multidisciplinary committee

Please update your summary in the Proposed Project tab

By another user
October 01 2020 12:45PM

Modify

New Annotation - Lay Summary

Field Value: Lay summary



248 words left

Please update your summary in the Proposed Project tab


Submitting an Application (Eligibility or Full)

Prior to submitting, you will need to make sure that all required fields are complete, that you have attached all of the correct documents and that all invitations have been responded to. You can download the full application to review it by clicking the “Application PDF” button near the top of your application before the different tabs.

6026 | Impact Grants | Draft Application

i

- Some information is copied directly from your organization and profile and will appear as re displayed is not correct please contact the Programs Team at helpdesk@shrf.ca before sta
- If you wish to communicate with staff regarding your application, use the **Notes** tab located
- The system will automatically log you out after 60 minutes of inactivity. Make sure to const information before exiting out of the application.

 Application PDF

←

Once the application is confirmed as complete, it is time to submit! **NOTE:** the RMS will validate and flag errors, but it is the Principal Investigator’s responsibility to ensure completion and accuracy, with the system review as only a reference. Only the **Principal Investigator can submit**, so they will need to make sure no one else has the application locked.

Once you are in the application, look at the bottom of your screen where you should see a “Submit” button. If you do not see the button, please make sure that you are not Viewing the application (check in the top left corner where it will say View or Edit. If it says View, click the button to change to Edit) and make sure that the deadline hasn’t passed. If everything is good to go, please click the “Submit” button. A message will then appear letting you know that you have successfully submitted. An email will also be sent to you and all other contacts on the grant letting you know the application is submitted and will have an attachment of the full application.


If you submit your application earlier then intended, please contact SHRF at helpdesk@shrf.ca.

Results

Once the review process is complete, applicants are informed of their results through an email sent from the RMS. This email will attach a document of the review results. In this email there will be further instructions on how to accept the Notice of Acceptance with its terms and conditions as well as any special conditions that will need to be completed prior to release of funds.

SHRF 2020-21 Solutions - Impact Grant Competition Results

shrf@smartsimple.ca
Thu 2020-12-03 1:45 PM
To: You
Cc: tanyasmp@gmail.com; tanyaskor43@outlook.com

 Review_Results.pdf
29 KB

Dear Tanya Skor,

Saskatchewan Health Research Foundation (SHRF) recently made its funding decisions for 2020-21 Solutions - Impact Grant. I am pleased to inform you that SHRF has awarded you a 3 years Impact Grants for \$20,000.00. All information regarding peer review results and grant acceptance documents can be found on the RMS. The below list identifies what documents you can find and where once logged in to the RMS.

Peer Review Results & Comments
To see your funding results, including score, rank and reviewer comments, see the document attached to this email. You and all other contacts on the grant can also view this document by clicking on the "Results" icon on the RMS Home Page. From there, find your grant and click "Open". At the top of the application you will find an upload field called "PDF of Review Results" where you will find the results document.

Notice of Acceptance (NOA)
To accept or decline this offer with its terms and conditions, you will need to review and complete the NOA. You will receive a second email when the NOA is ready on the system for your review and decision.

Special Conditions
Prior to the release of funds, there may be conditions that have been placed on the grant that will need to be completed. You will receive a second email when the Special Conditions is ready on the system for your review and decision.






Once you have completed these steps, SHRF will authorize your funding and the research office at your institution will assist you in setting up research accounts for administration of these funds. Please find a copy of our current SHRF Funding Guide on the SHRF website and pay particular attention to section 4 regarding Grant Management. Please note that continued funding depends on submission of satisfactory progress reports.

For more information regarding your funding, grant management and SHRF supports, we will be hosting an Orientation session. A separate email will be sent with specific details, including the date and time. As there is a delay between notifying applicants of their success and SHRF's public announcement of funding recipients for each competition, **please refrain from posting about your results on social media or other public forums until SHRF has made a formal announcement.**

If you have any questions, please direct them to your Program Manager Karen Tilsleyat fundinginfo@shrf.ca. Congratulations and best wishes for success in your research. We look forward to supporting you, hearing about your progress and findings, and communicating the impact of your work.


Sincerely,

To find your results on the RMS login and go to the Results icon found on the home page. In this icon find the application and click the open button. This is where you will find any review documentation related to your application.

 Home    


Welcome Researcher Testing

If you require assistance using the RMS, please contact the SHRF RMS Helpdesk at helpdesk@shrf.ca, 8:30 am to 4:30 pm CST, Monday to Friday.




Funding Opportunities

View currently open funding opportunities and start an eligibility application.



Personal Profile

Here is where you access your Profile information. PIs are required to validate their profile prior to application submission.




Reference Documents

Click here for user manuals & videos

Applications

<p>0</p> <p>Eligibility Applications</p> <p>Complete and submit your eligibility applications.</p>	<p>3</p> <p>Full Applications</p> <p>Complete and submit your full applications.</p>	<p>0</p> <p>Action required: Contribution Forms</p> <p>Complete and submit your contribution forms for applications you are a part of.</p>	<p>4</p> <p>Submitted Contribution Forms</p> <p>View contribution forms you have submitted and will be included in applications you are a part of.</p>
<p>1</p> <p>Results</p> <p>See your results, review comments and view all previously submitted applications.</p>		<p>3</p> <p>Grant Authorization</p> <p>Accept your grant and remediate special conditions. View your AFF</p>	



Grant Authorization

Special Conditions For Funding

If there are any special conditions you will receive an email with instructions on how to find the special conditions in the RMS. You can find this in the “Grant Authorization” icon found on the home page. In this icon you find a list of activities associated with your offered grant. Find the activity type “Special Conditions” in the list view that is in the “Sent for Approval” status and click the open button.

Grant Authorization

<input type="checkbox"/>	#	Principal Investigator	Application Type	Program Name	Application ID #	Scientific Title	Application Status	Activity Type	Activity Status	Due Date	
<input type="checkbox"/>	1	Researcher Testing	Impact Grants		6050	scientific title	Revisions Requested	Authorization For Funding	Approved		Open
<input type="checkbox"/>	2	Researcher Testing	Impact Grants		6050	scientific title	Revisions Requested	Notice Of Acceptance	Sent for Approval		Open
<input type="checkbox"/>	3	Researcher Testing	Innovation Grants		6035	scientific title	Committee Review	Special Condition For Funding	Completed	2020-10-28	Open

Under the “Special Conditions for Funding” header is a list of special conditions that will need to be responded to by the due date at the top of this view. To respond to the list of conditions there is a box under the header “Applicant’s Response to Special Conditions” where you can provide any information regarding these conditions. If there is any documents that are requested they can be uploaded using the upload button under the header “Special Conditions for Funding Documentation”. Once you have responded click the submit button where SHRF staff will be notified that it has been submitted. An email will be sent that your special condition has been submitted.

6035 | Innovation Grants | Special Condition

[View PDF](#)

SPECIAL CONDITIONS

Due Date

2020-10-28

Special Conditions for Funding

Prior to the authorization of funding, you will need to complete the listed special conditions for funding. If you have any questions please contact the program manager or email fundinginfo@shrf.ca.

Your application indicates that you have applied for national support that has potential overlap with your SHRF proposal. Please let us know about the outcome of the national competition as soon as possible. If you receive funding that overlaps with your SHRF grant, we must discuss how this will affect your SHRF funding.

You have progress reports due. As stated in the SHRF’s Funding Guide “SHRF reserves the right to delay release of funds for subsequent grants if previous reporting requirements, including post-grant follow up requests, are outstanding”. You must complete and submit these reports in order for funding to be released.

* Applicant’s Response to Special Conditions

Please provide information regarding the special conditions for your funding. Any documents requested can be uploaded using the upload button directly below this text box.

Special Conditions for Funding Documentation

Please upload any requested documentation in relation to the special conditions.



[Save Draft](#)

[Submit](#)

Notice of Acceptance

Once an offer has been made, successful applicants must accept the grant or award by signing the Notice of Acceptance (NOA) form provided on the SHRF RMS, constituting an acceptance of the terms and conditions for funding. SHRF funds are not released until SHRF receives the signed acceptance and confirmation that all terms and conditions have been met.

To find your notice of acceptance login to the RMS and go to the “Grant Authorization” icon found on the home page. In this icon you find a list of activities associated with your offered grant. Find the activity type “Notice of Acceptance” in the list view that is in the “Sent for Approval” status and click the open button.

Grant Authorization

#	Principal Investigator	Application Type	Program Name	Application ID #	Scientific Title	Application Status	Activity Type	Activity Status	Due Date	
1	Researcher Testing	Impact Grants		6050	scientific title	Revisions Requested	Authorization For Funding	Approved		Open
2	Researcher Testing	Impact Grants		6050	scientific title	Revisions Requested	Notice Of Acceptance	Sent for Approval		Open
3	Researcher Testing	Innovation Grants		6035	scientific title	Committee Review	Special Condition For Funding	Completed	2020-10-28	Open

You can preview/download a copy of the Notice of Acceptance by clicking on the “preview Notice of Acceptance” button. Once you have reviewed the document, please indicate the month you would like to start (if applicable), sign the form and upload the completed version by the deadline date in the “Notice of Acceptance Upload” button and click submit. At anytime you can click save draft and come back.....

6050 | Impact Grants | Notice Of Acceptance

To accept or decline this offer with its terms and conditions, please **download the Notice Of Acceptance from the preview button and review. For Establishment grantees please indicate the month you would like to start (July - October). All grantees must sign the form in the appropriate spot and **upload** the completed version by the deadline and click submit.**

Deadline Date
2020-10-20

[Preview Notice Of Acceptance](#)

*** Notice Of Acceptance Upload**

Please upload the signed copy of your Notice of Acceptance and click 'Submit'

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

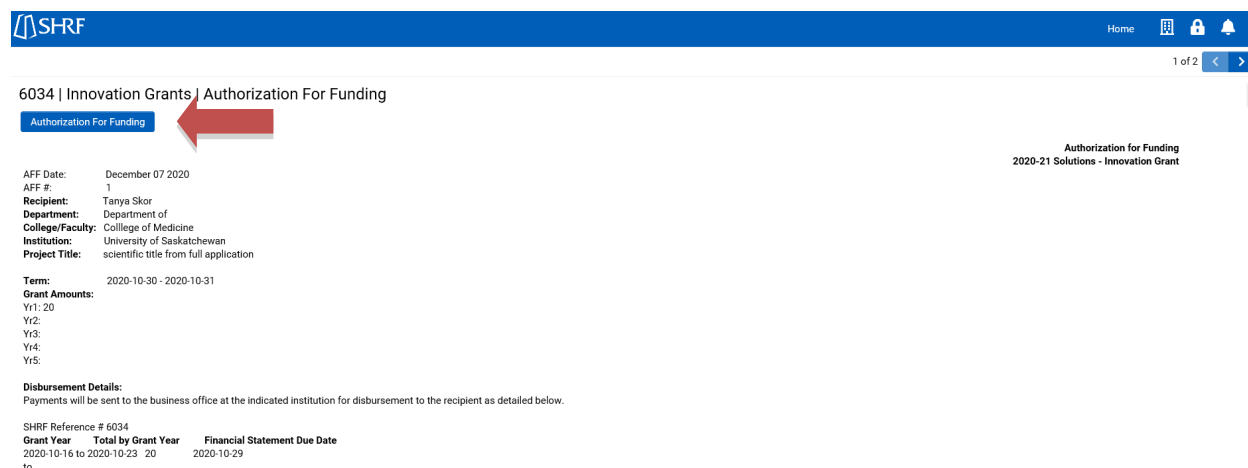
Authorization for Funding

Once any outstanding terms and conditions have been met, SHRF sends an Authorization for Funding form (AFF) to the institution where the funds will be held and managed in a separate research fund, according to accepted accounting practices for research funds. Once SHRF has received your signed Notice of Acceptance you will receive an email that your application has been authorized. This email will have the Authorization for Funding attached. The research office and financial office will be cc'd on this email. You can also find a copy of

the Authorization for Funding on the RMS home page under the “Grant Authorization” icon in the “Approved” Status. Once you click open you will see the Authorization for Funding as well as a button to download a copy.

Grant Authorization

#	Principal Investigator	Application Type	Program Name	Application ID #	Scientific Title	Application Status	Activity Type	Activity Status	Due Date	
1	Researcher Testing	Impact Grants		6050	scientific title	Revisions Requested	Authorization For Funding	Approved		Open
2	Researcher Testing	Impact Grants		6050	scientific title	Revisions Requested	Notice Of Acceptance	Sent for Approval		Open
3	Researcher Testing	Innovation Grants		6035	scientific title	Committee Review	Special Condition For Funding	Completed	2020-10-28	Open



6034 | Innovation Grants | Authorization For Funding

[Authorization For Funding](#)

Authorization for Funding
2020-21 Solutions - Innovation Grant

AFF Date: December 07 2020
 AFF #: 1
 Recipient: Tanya Skor
 Department: Department of
 College/Faculty: College of Medicine
 Institution: University of Saskatchewan
 Project Title: scientific title from full application

Term: 2020-10-30 - 2020-10-31
 Grant Amounts:
 Y1: 20
 Y2:
 Y3:
 Y4:
 Y5:

Disbursement Details:
 Payments will be sent to the business office at the indicated institution for disbursement to the recipient as detailed below.

SHRF Reference # 6034

Grant Year	Total by Grant Year	Financial Statement Due Date
2020-10-16 to 2020-10-23	20	2020-10-29

Grant Management

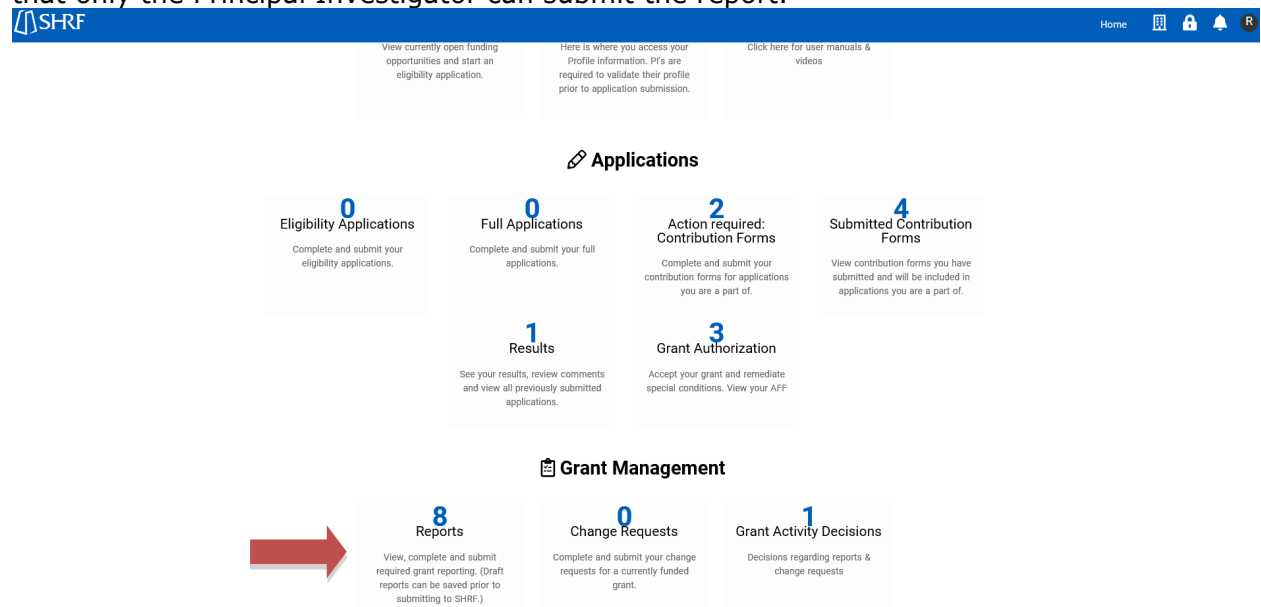
Reporting

Researchers are required to provide annual and final progress reports to SHRF. Reminders are sent to researchers one month prior to the anniversary of their funding start date. These reports are an important tool for SHRF’s accountability to the provincial government and funding partners, and in evaluating and communicating the impact of our funding programs.

To find your progress report, log in to the RMS where you will be directed to your Home Page. Find the Grant Management header and then click on the Reports icon. A list view will appear, where you will need to find the report that is due. As some grants will require more than one report, please make sure that you are completing the correct report by confirming the due date at the end of the list view. Once you have found the correct progress report click the Open button to begin completing the information.

Once in the report, you will be able to work on the requested information. You may leave and come back to the report at anytime by clicking "save draft" and then exiting the form. You may invite a Report Writer to help with completing the information. To do this click on the Invitations button in the left hand menu and then click the "+" button to begin that

process. Once all information is complete, you can submit the report for review. Please note that only the Principal Investigator can submit the report.



The screenshot shows the SHRF RMS dashboard. At the top, there are navigation links for Home, a calendar icon, a lock icon, a bell icon, and a user profile icon. Below the navigation bar, there are three main sections: 'Applications', 'Grant Management', and 'Reports'.

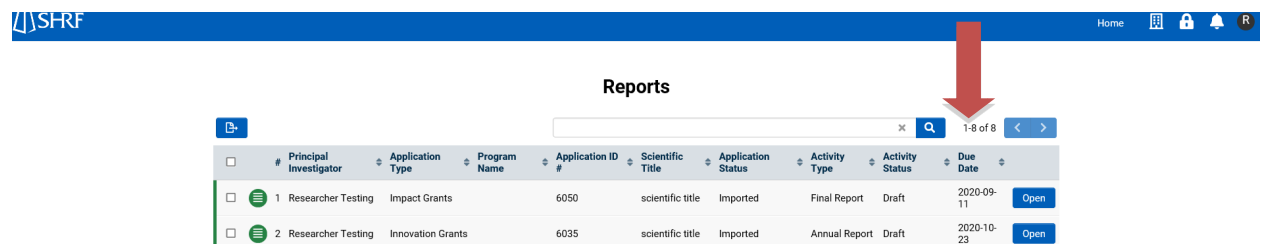
Applications section includes:

- 0 Eligibility Applications**: Complete and submit your eligibility applications.
- 0 Full Applications**: Complete and submit your full applications.
- 2 Action required: Contribution Forms**: Complete and submit your contribution forms for applications you are a part of.
- 4 Submitted Contribution Forms**: View contribution forms you have submitted and will be included in applications you are a part of.
- 1 Results**: See your results, review comments and view all previously submitted applications.
- 3 Grant Authorization**: Accept your grant and remediate special conditions. View your AFF applications.

Grant Management section includes:

- 8 Reports**: View, complete and submit required grant reporting. (Draft reports can be saved prior to submitting to SHRF.)
- 0 Change Requests**: Complete and submit your change requests for a currently funded grant.
- 1 Grant Activity Decisions**: Decisions regarding reports & change requests.

A red arrow points from the '8 Reports' card to the 'Reports' section below.



The screenshot shows the 'Reports' section of the SHRF RMS dashboard. It features a search bar and a table with the following data:

#	Principal Investigator	Application Type	Program Name	Application ID	Scientific Title	Application Status	Activity Type	Activity Status	Due Date	
1	Researcher Testing	Impact Grants		6050	scientific title	Imported	Final Report	Draft	2020-09-11	Open
2	Researcher Testing	Innovation Grants		6035	scientific title	Imported	Annual Report	Draft	2020-10-23	Open


A red arrow points from the 'Reports' section above to the search bar in this screenshot.

Change Request


The Principal Investigator may request changes to their grant in relation to the following: Timelines (i.e. extensions), Budget, Team Members or other possible requests that relate to the grant. Extensions may only be requested when the grant is near the current end date of the grant, but all other change requests may come in at anytime.

To complete a change request **login in to the RMS and on the Home page under the Applications header**, click the “Results” button and then open the grant that will be affected by the change. At the top of the grant, you will see a “Change Request” button. Click this button to generate the form. From there, go back to your Home Page, scroll to the Grant Management header and click the Change Request **button**. From there, you’ll be able to open and complete the change request form.


Friday,



Funding Opportunities
View currently open funding opportunities and start an eligibility application.



Personal Profile
Here is where you access your Profile information. PIs are required to validate their profile prior to application submission.



Reference Documents
Click here for user manuals & videos

Applications

0
Eligibility Applications

Complete and submit your eligibility applications.

0
Full Applications


Complete and submit your full applications.

2
Action required: Contribution Forms

Complete and submit your contribution forms for applications you are a part of.

4
Submitted Contribution Forms

View contribution forms you have submitted and will be included in applications you are a part of.



1
Results

See your results, review comments and view all previously submitted applications.

3
Grant Authorization

Accept your grant and remediate special conditions. View your AFF

Results

1-1 of 1 < >

#	Program Name	Program Type	Application ID #	Principal Investigator	Organization	Lay Title	Scientific Title	Status
1	Innovation Grants		6034	Tanya Skor	University of Saskatchewan	Lay title from full application	scientific title from full application	Funded Open

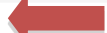
Logs
1 of 1 < >

Main
Notes
Invitations

6034 | Innovation Grants | Funded

Application PDF

PLEASE NOTE: Change request forms are accessed through the applicant homepage under the Grant Management header in the Change Request icon once created. If you have created a change request but are having issues accessing the form please contact SHRF at fundinginfo@shrf.ca for assistance.

Create Change Request


GRANT INFORMATION
APPLICATION DETAILS
PROPOSED PROJECT
BUDGET
ROLES
APPROVALS

View currently open funding opportunities and start an eligibility application.

Here is where you access your Profile information. PIs are required to validate their profile prior to application submission.

Click here for user manuals & videos

Applications

0
Eligibility Applications

Complete and submit your eligibility applications.

0
Full Applications

Complete and submit your full applications.

2
Action required: Contribution Forms

Complete and submit your contribution forms for applications you are a part of.

4
Submitted Contribution Forms

View contribution forms you have submitted and will be included in applications you are a part of.

1
Results

See your results, review comments and view all previously submitted applications.

3
Grant Authorization

Accept your grant and remediate special conditions. View your AFF

Grant Management

8
Reports


View, complete and submit required grant reporting. (Draft reports can be saved prior to)

1
Change Requests

Complete and submit your change requests for a currently funded grant.

1
Grant Activity Decisions

Decisions regarding reports & change requests




Tips

Save Frequently

Saving your work frequently is very important. No warnings about unsaved work will appear before logging out of your application. **Save frequently and in multiple ways. For example:**

- In the application record
- In xml worksheets before you close them
- After uploading a document (the document should appear on screen if successfully uploaded but the record needs to be saved for it to appear in your application)
- After making changes to your profile

Other Quick Tips

- Hover over fields throughout the RMS where you see “” to get more tips
- Fields with a * are required
- Sections with a (▶) may be expanded or (▼) to be hidden
- ‘Jump to’ section at the left of the application. You can now click on it and it will take you to the exact spot in the application
- Validation fields - Any fields that aren’t filled in when you go to submit will be listed as errors at the top of the application, you can click on each error and it will take you to the section that needs to be filled in
- **Notes:** on the left-hand side bar you can find “notes”. Once you add a note here SHRF will receive an email with any questions that you have for your application