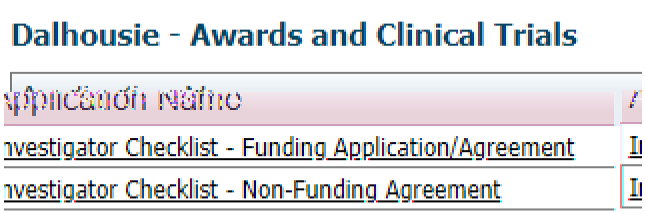
How to Submit a Application Form

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.

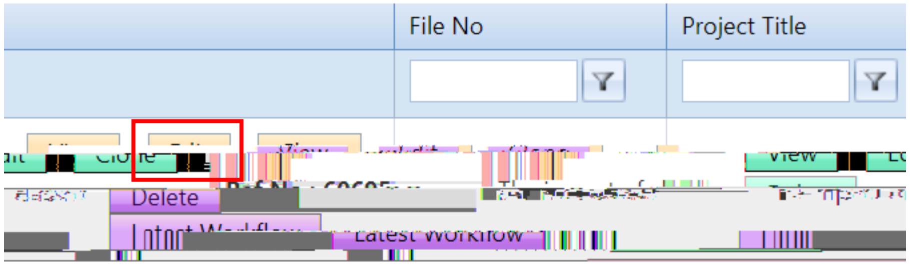
Under **5l·fK2ǆălŜ – ! ǿl·ŊŘă l·yŘ / ťlyήŎl·f ¢ŊĂl·ťă**, select the relevant form.


Dalhousie - Awards and Clinical Trials

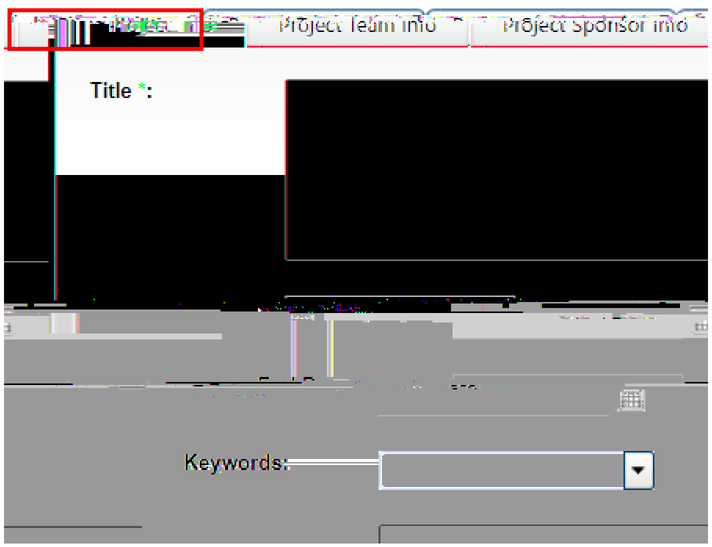
Application Name	
nvestigator Checklist - Funding Application/Agreement	I
nvestigator Checklist - Non-Funding Agreement	I

The form includes a series of tabs at the top.

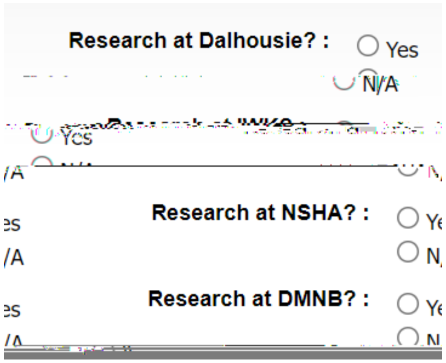
Locate the relevant file, and open with the **9Řǻ** button. The View button is read-only mode and will not allow you to save changes.



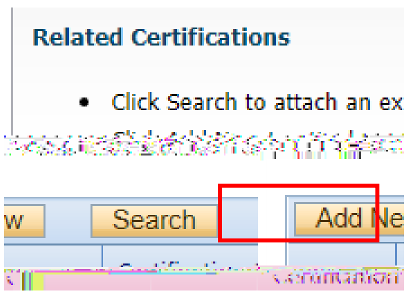
Basic details are captured under the **tǘ2ŝŜǾǻ Lyfi2** tab, including Project Title, Start and End Dates (these dates can be estimated if not finalized yet), and Keywords relevant to the project.



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

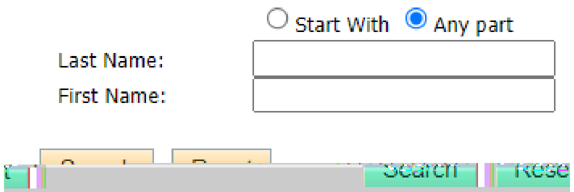


The PI can also link a Certificate file to the application. Clicking Search will generate a list of the PI’s Human Ethics and Animal Ethics protocols in the system.

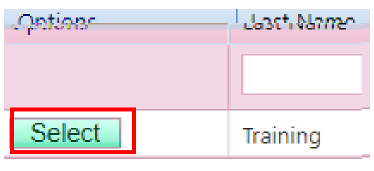


Click Search Profiles.

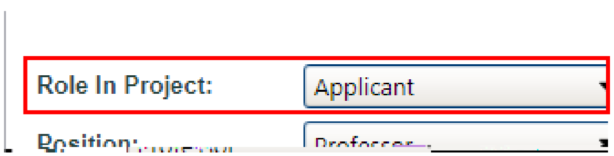
Search the name. If nothing appears, try the first or last name separately (name might include hyphens, initials, etc.)



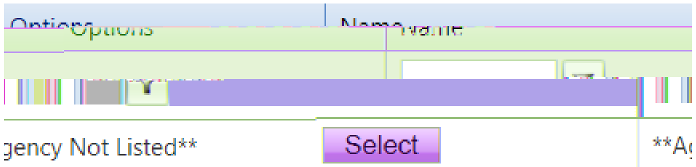
Click the Select button.



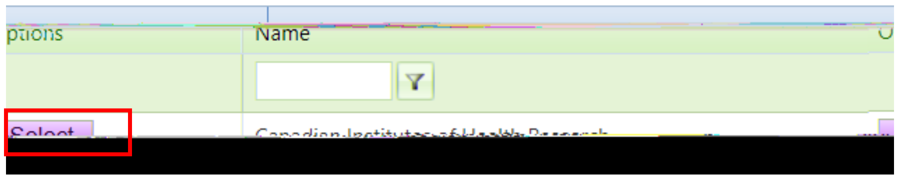
The team member's profile details will auto-populate. The drop-down list can be used to select their role in the project.



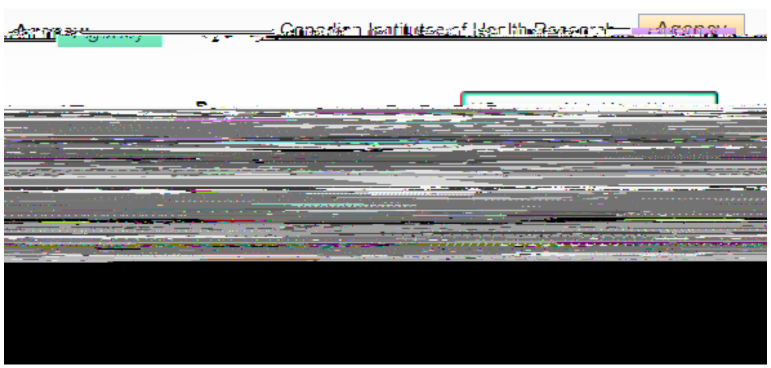
b2ǘŜ: If the agency is not listed, select the Agency Not Listed option. Type the agency name in the comment box provided.



If the agency appears, click the Select button.

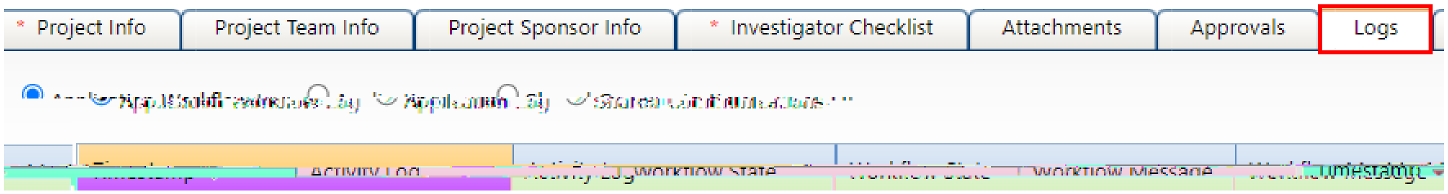


Select the program from the drop-down list. Names are arranged in alphabetical order.

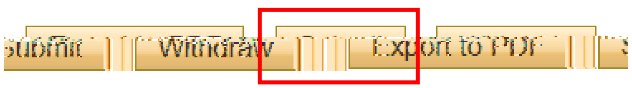


If applicable, enter the Competition Date (funder deadline). The Start and End Dates can be estimated

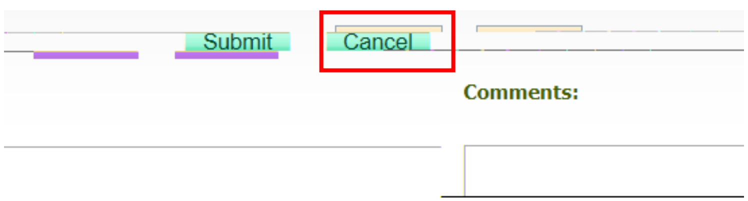
The **Logs** tab will automatically track changes to the file made overtime, as well as messages shared between signing authorities, researchers, and administrators.



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.



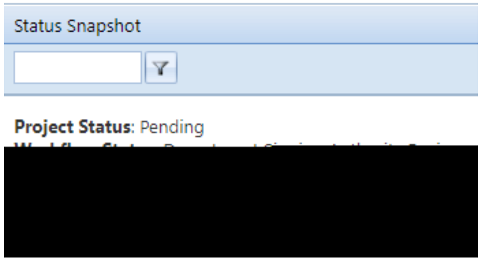
Upon submission, the file will move from **Applications: Drafts** to **Applications: Under Review**. At this point, no edits can be made, and the file will be read-only.

Applications: Drafts

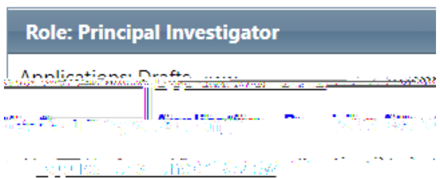
Applications: Requiring Attention

Applications: Under Review

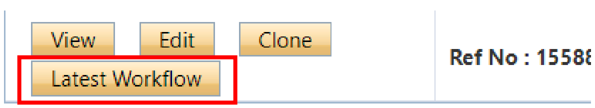
If the PI needs to make revisions, the Status Snapshot will display where the application is currently sitting. The Signing Authority or ORS/OCIE Administrator can return the application for revision.



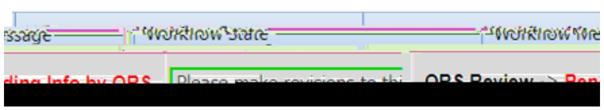
If revisions are required, the PI and project team members will receive an automatic email notification. Login to the portal and click **!LJLJfiŎl-ííì2yãY wŜljdzÎÌÌyƎ !ííŜyííì2y**.



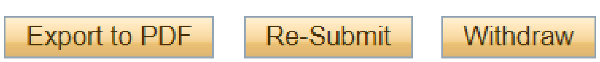
Click Latest Workflow next to the project.



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



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



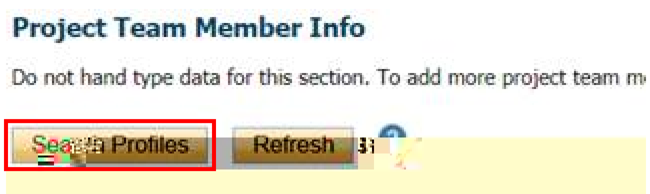
How to Change the Principal Investigator in a Draft File

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 **9Řĭű** button and click the **{ďzōYĭű** button.