



# Key Differences: Ethics versus Funding Applications in the Researcher Portal

Audience: Principal Investigators & Project Team Members

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# Purpose of This Document

In December 2017, researchers will be able to submit their research funding applications and their applications to support activities related to research collaborations for institutional sign-off via the Researcher Portal.

*For users with experience completing ethics applications in the Researcher Portal, the research funding applications will seem familiar. Much of the appearance and functionality of the applications is similar.*

**As funding applications are processed differently than ethics applications, there are key differences between the two types of applications that even experienced users of the Researcher Portal should be aware of.**

**This document intended to help experienced users get up to speed with the new application type in the Researcher Portal and some of its features.**

# Purpose of This Document Cont'd

Please note that this document does NOT cover all the details of completing research funding applications through the Researcher Portal.

**If you are new to the Researcher Portal, or would like more detailed instructions on using the Researcher Portal for funding applications, please refer to the other training materials on the Researcher Portal Tools and Resources website.**

## Notes about research funding applications:

The **Researcher Portal research funding application** is internal to Memorial University for **internal processing only**.

It does **NOT** take the place of a sponsor-specific portal, such as those associated with Tri-Council funding. The Researcher Portal application is used *in addition* to the application developed and submitted in the external portal.

## Notes about research funding applications:

**Research funding applications are available for RIS and Marine Institute (MI) beginning December 12, 2017.** Specific types of applications that are NOT currently submitted through the Researcher Portal:

- Canada Foundation for Innovation (coordinated by Research Initiatives & Services, RIS, formerly SIRI)
- Canada Research Chairs (coordinated by Research Initiatives & Services, RIS, formerly SIRI)
- School of Graduate Studies fellowships and scholarships (coordinated by SGS)
- Undergraduate Student Research Awards (USRA)

Researchers are encouraged to consult with their academic unit if there is uncertainty around choosing an appropriate application option.

# Key Area 1: Signing Authorities

The first key area involves the implementation of Departmental and Faculty Signing Authorities into the processing of research funding applications and how these signing authorities may impact when researchers need to submit these applications. **Most research funding applications must travel through Signing Authorities before being received by the appropriate research office.**

*Depending upon the application and the Principal Investigator's affiliation, the application will electronically route to the appropriate Departmental and Faculty Signing Authorities for review before being received by the Research Initiatives & Services (RIS) office.*

*Approvals from co-investigators' faculties would be uploaded as an attachment on the Attachments tab, as the application will only be routed to the Principal Investigator's department and faculty.*

# Key Area 1: Signing Authorities Cont'd

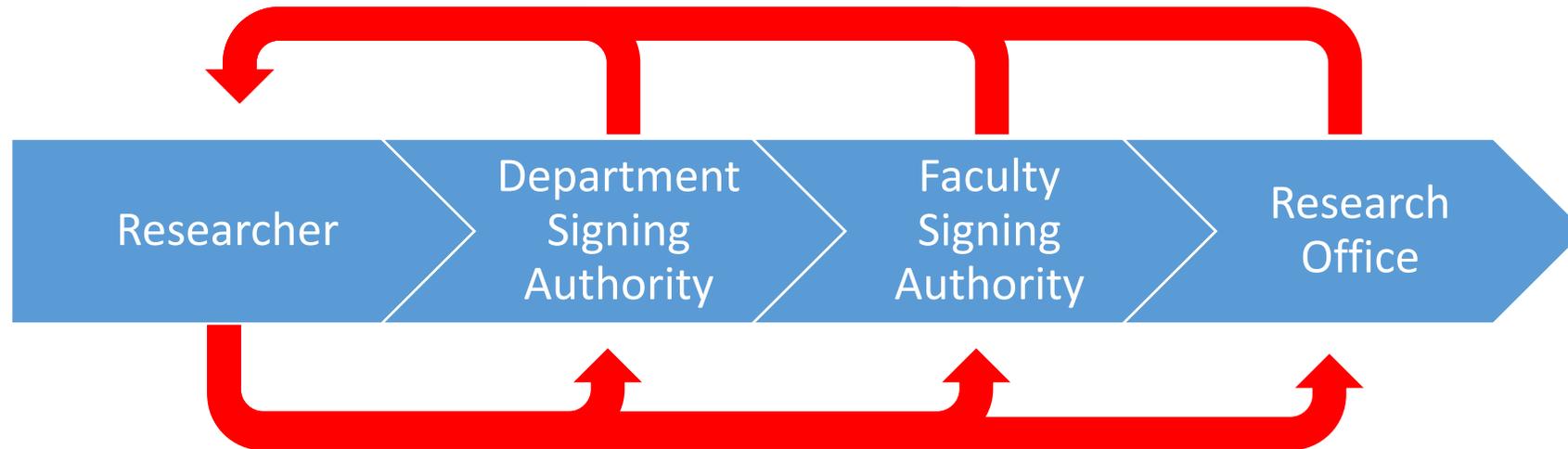
As the Signing Authorities are determined by the Principal Investigator's affiliation, **it is important to ensure that your account information is accurate in the Researcher Portal.**

*If you need to update your account information*, please submit the Update My Account Information form on the Researcher Portal Tools and Resources website.

*If you are a researcher with more than one affiliation*, you can select the affiliation appropriate for the application by selecting it from the Affiliation dropdown box in the Principal Investigator section of the Project Team Info tab.

# Key Area 1: Signing Authorities Cont'd

Signing Authorities can approve applications or push them back to the Principal Investigator and project team for revisions.



If the application is pushed back for revisions, it will appear under the Applications: Requiring Attention link. **When the application is resubmitted, it will return to the Signing Authority who pushed it back so that they can continue their review.**

# Key Area 1: Signing Authorities Cont'd

Researchers must factor the time that will be needed for Signing Authorities to review and approve applications into their timelines for submitting applications.

Researchers already have to factor in collecting approver signatures in their current timelines for submitting applications, but it is important to emphasize this consideration as research funding applications are submitted through the Researcher Portal.

# Key Area 1: Signing Authorities Cont'd

After submitting an application, if you wish to view where an application is in the approval process, you may always look at the Status Snapshot of the application. When an application is under review, it will appear under the role block quick link called “Applications: Under Review.” Click on the quick link to view the status of your application. The column, **Status Snapshot**, will show your project status and where your application is in the workflow.

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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>
<a href="#">View</a> <a href="#">Clone</a> <a href="#">Latest Workflow</a>	<b>Ref No : 8531</b>	Test Application	Dr. Memorial Researcher (Faculty of Science\Department of Biology)	Application for Research Funding (Awards\Awards)	<b>Project Status:</b> Pending <b>Workflow Status:</b> Department Signing Authority Review

# Key Area 2: Required Project Team Members

**Research funding applications require additional team members.** They will help to ensure the application is appropriately processed.

- **Your unit's Grant Facilitator**, if applicable to your unit
- **The RIS Workflow Coordinator**

Add these team members in the initial stage of your application to ensure that they are able to assist in the processing of your application. **These individuals will be in contact with you while you are drafting and before you submit your application, so do not add them at the last minute.**

## Adding your unit's Grant Facilitator:

Follow the same process to add a Project Team Member.

Search for the appropriate individual in the Investigator List window:

- Go to this webpage – <http://www.mun.ca/research/funding/grants/facilitators.php> – for a list of Grant Facilitators by unit.

On the Project Team Member Info screen, choose the appropriate Role in Project:

- Choose “Grant Facilitator” from the dropdown list.

## **Adding the RIS Workflow Coordinator:**

Follow the same process to add a Project Team Member.

Search for the appropriate individual in the Investigator List window:

- RIS Workflow Coordinator: Search for “RIS” in the Last Name field.

On the Project Team Member Info screen, choose the appropriate Role in Project:

- RIS Workflow Coordinator: Select “RIS – Workflow Coordinator.”

# Key Area 3: Project Sponsor Info Tab

**Research funding applications have a tab that is unique to them: the Sponsor Info tab.**

In the Researcher Portal, a “sponsor” is the agency, institution, or company associated with a program. The Project Sponsor Info tab is where details about the programs associated with an application are provided. *More than one sponsor and program can be added to an application, as appropriate.*

To add a sponsor and program, click **Add New** on the Project Sponsor Info tab. The Sponsor Info window will appear.

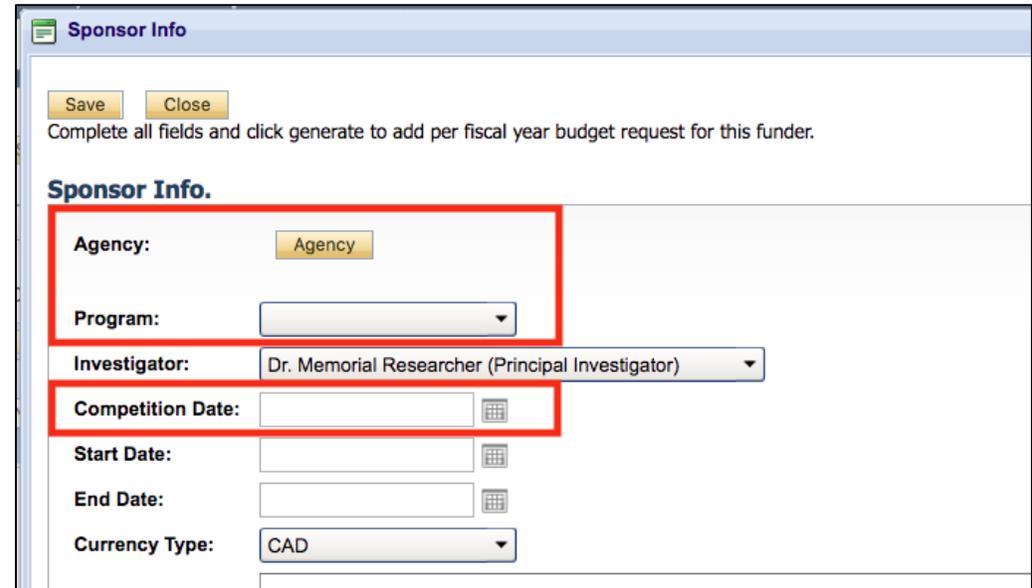
You may click **Add New** to add additional sponsors and programs after creating your first sponsor entry, if applicable.

# Key Area 3: Project Sponsor Info Tab Cont'd

In the Sponsor Info window, enter the following and click **Save**:

- **Agency** - Click on Agency. Search for either Agency Name or Abbreviation. Select the appropriate agency for your application.
- **Program** – Select from the dropdown list, which is specific for the agency.
- **Competition Date** (if applicable)

If you cannot locate the program you need, contact the RIS Workflow Coordinator ([RISworkflow@mun.ca](mailto:RISworkflow@mun.ca) or 709.864.3805) for assistance.



The screenshot shows a web application window titled "Sponsor Info". At the top, there are "Save" and "Close" buttons. Below them is a instruction: "Complete all fields and click generate to add per fiscal year budget request for this funder." The main form area is titled "Sponsor Info." and contains several fields: "Agency:" with a search button labeled "Agency"; "Program:" with a dropdown menu; "Investigator:" with a dropdown menu showing "Dr. Memorial Researcher (Principal Investigator)"; "Competition Date:" with a text input and a calendar icon; "Start Date:" with a text input and a calendar icon; "End Date:" with a text input and a calendar icon; and "Currency Type:" with a dropdown menu showing "CAD". Red boxes highlight the "Agency:", "Program:", and "Competition Date:" fields.

## Key Area 4: Transition from Under Review to Post-Review

The next key area includes when a research funding application moves from the Applications: Under Review link on the Researcher Portal Home Page to the Applications: Post-Review link.

Ethics applications move from under review to post-review when the ethics office has rendered a decision on the application. Research funding applications will remain in **Applications: Under Review** until a funding decision has been made by the Sponsor/Agency.

Once the application has been approved by the Sponsor/Agency, the application can no longer be modified but is available for viewing under **Applications: Post Review** on the Researcher Portal homepage.

# Key Area 5: Unique Event Forms

As research funding applications are a different type of application from ethics applications, they require their own post-review management.

Event forms available to research funding applications include, but may not be limited to:

- Amendments
- Agreements
- Letter of Transfer Requests

Make sure to read the descriptions of the Event forms to ensure you are completing the correct one for your purpose.

If you have any issues or questions about the Memorial Researcher Portal please submit a Help Desk Ticket at

<https://rpresources.mun.ca/help-2/help/>