




PG Stage 1 February 2020 – Partner Invitation Process

Invite Partners	Accept Invitation as Partner
<p>Project Director (PD) 1. Once in the application form, go to the <b>Invited Partners</b> Module and read the <b>Instructions</b>:</p> <div><div><div>SSHRC CRSH</div><div>Identification</div><div>Activity Details</div><div>Organization Information +</div><div>Organization Involvement +</div><div>Participants</div><div>Description of Team +</div><div>Invited Partners</div><div>Partners/Contributors +</div><div>Summary</div></div><div><div>Contact Us</div><div>Portfolio</div><div>Help</div><div>Verify Page</div><div>Search</div><div>Instructions</div><div>Canada Site</div><div>Exit</div></div></div> 	
<p>PD2. List the name and email address of the contact person for each partner organization and click <b>Save</b> (you do not need to add all the partners at once; partners can be added at a later time).</p> <div><div><div>Français</div><div>Save</div></div><div><div>Preview</div></div><div><div>Contact Us</div><div>Portfolio</div></div><div><div>Help</div><div>Verify Page</div></div></div>  <p><b>Partnership Grants Institution</b></p> <p><b>Stage 1 - Invited Partner Organizations (Mandatory)</b></p> <p>List the family name and E-mail address of the contact person for each partner organization. Partner organization is expected to support activities of the formal partnership by sharing in intellectual leadership.</p> <p>A partner is an organization that participates actively in a formal partnership and contributes in a meaningful way to the partnership. A partner can be a business, university, government department (federal, provincial, territorial, municipal), for-profit or not-for-profit organization, or a community organization. All partners must participate in the application.</p> <p><b>New Page</b></p> <p>New Entry</p> <div><div>Family name</div><div>Di Gaetano</div><div>(30 chars)</div></div> <div><div>Given name</div><div>Stefani</div><div>(30 chars)</div></div> <div><div>E-mail</div><div>stefani.digaetano@sshrccrsh.gc.ca</div><div>(100 chars)</div></div> 	

Invite Partners

PD3. After you click **Save**, the system will generate an email for each person, inviting them to participate in the application.

Invitation not yet accepted

Family name

Di Gaetano

(30 chars)

Given name

Stefani

(30 chars)

Invitation E-mail sent to

Stefani.DiGaetano@SSHRC-CRSH.GC.CA

Resend E-mail

Clear entry

(If you add new partners at a later time, when you click **Save**, the system will generate emails only for the partners recently added; the partners already invited will not receive a second email.)

Until the partner accepts the invitation, the entry will be listed as *Invitation not yet accepted*.

Accept Invitation as Partner

Partner (P) 1. The contact person for the Partner Organization receives an automated email when invited by the PD to participate:

**Subject:** Invitation to participate on an application  
This is an automated E-mail message. Please do not reply.  
You have been invited to participate on an application to be submitted to the Social Sciences and Humanities Research Council (SSHRC) - Partnership Grants

Applicant Information
Applicant: [Name Project Director]
E-mail: [Email Project Director]
Funding Opportunity: Partnership Grants – Stage 1
Application deadline date (ET): 17/02/20 8:00 PM

[Click here](#) to accept or decline the invitation to participate on an application.  
If the link does not work, you can copy and paste the following address into your browser: [system generated link]

The link above is the only way to access this form. DO NOT DELETE this E-mail.  
We suggest you bookmark this link.

P2. The Partner Organization’s contact person follows the link provided in the automated email and arrives on this page:

Applicant Information	
Name	Anna Torgerson
E-mail	anna.torgerson@sshrc-crsh.gc.ca
Application Deadline:	2018-02-15 20:00:00.0
Form	<a href="#">Click here to view your form</a>

[Click here to access and complete the Partner Organization form.](#)  
[Click here to decline the invitation to participate in this application.](#)

Click on hyperlink (red arrow) to complete the Partner Organization form.

PD4. When the partner clicks on the hyperlink at step P2, the entry will be listed as *Invitation accepted but not yet verified*.

Status

Invitation accepted but not yet verified

View form

Family name

Di Gaetano

(30 chars)




Invitation E-mail sent to




Stefani.DiGaetano@SSHRC-CRSH.GC.CA

Resend E-mail

Clear entry

Invite Partners	Accept Invitation as Partner
	<p>P3. Once in the <b>Partner Organization</b> form, the Modules to complete can be found on the left side: <i>Partner Information</i>, <i>Letter of Support</i>, and <i>Submit</i>:</p> <div data-bbox="1387 261 2467 625"><div><div>SSHRC CRSH</div><div>Application Summary</div><div>Partner Information</div><div>Letter of Support ↑</div><div>Submit</div><div>↑ = Electronic Attachment</div></div><div><div>Application Summary</div><div>Funding opportunity Partnership Grants</div><div>Grant type Institution</div><div>Application Title Testing instructions</div><div>Applicant</div><div>Family name Test_Theoret</div><div>Given name Shawne</div></div></div>
<p>PD5. When the partner successfully verifies the Partner Organization form at step P4, the entry will be listed as <i>Invitation accepted and verified</i>:</p> <div data-bbox="217 1015 1201 1281"><div>Status <b>Invitation accepted and verified</b> ←</div><div>View form</div><div>Family name <input type="text" value="Di Gaetano"/> (30 chars)</div><div>Invitation E-mail sent to <input type="text" value="Stefani.DiGaetano@SSHRC-CRSH.GC.CA"/> Resend E-mail</div><div>Clear entry</div></div>	<p>P4. After completing the <i>Partner Information</i> and <i>Letter of Support</i> Modules, the Partner Organization's contact person goes to the <b>Submit</b> Module and clicks on the hyperlink (red arrow below) to verify the whole form:</p> <div data-bbox="1354 854 2585 1099"><div><div>SSHRC CRSH</div><div>Application Summary</div><div>Partner Information</div><div>Letter of Support ↑</div><div>Submit</div><div>↑ = Electronic Attachment</div></div><div><div>Submit</div><div>You must successfully verify your form (all mandatory fields must be complete) before you can submit it to SSHRC.</div><div>Click here to verify your form. ←</div></div></div> <p>When the <b>verify your form</b> returns no more errors, the contact person arrives on this page:</p> <div data-bbox="1354 1182 2171 1442"><div><div>SSHRC CRSH</div><div>Application Summary</div><div>Partner Information</div><div>Letter of Support ↑</div><div>Submit</div><div>↑ = Electronic Attachment</div></div><div><div>Submit</div><div>Your form is now verified (all mandatory fields are completed).</div><div>Submit</div></div></div>

Invite Partners	Accept Invitation as Partner
<p data-bbox="83 256 1341 329">PD6. When the partner submits the form at step P5, the entry will be listed as <i>Form completed</i>:</p> <div data-bbox="190 378 1131 565"><div>Status <b>Form completed</b> </div><div><a href="#">View form</a></div><div>Family name <input type="text" value="Di Gaetano"/> (30 chars)</div><div>Invitation E-mail sent to <input type="text" value="Stefani.DiGaetano@SSHRC-CRSH.GC.CA"/> <a href="#">Resend E-mail</a></div><div><a href="#">Clear entry</a></div></div>	<p data-bbox="1341 134 2604 175">P5. <b>Submit</b> the form</p> <div data-bbox="1357 215 1800 535"><div><b>Submit</b></div><div>Your form is now verified (all mandatory fields are completed).</div><div><a href="#">Submit</a> </div><div><a href="#">Preview</a></div></div> <p data-bbox="1341 576 2604 693">The Partner Organization’s contact person can make changes at a later time, after Submitting the form, but no changes will be integrated into the application after the Project Director submits the application to SSHRC.</p>
<p data-bbox="83 693 1341 766">PD7. When all the partners have accepted their invitations, verified and submitted their forms, click <b>Verify Page</b> until it returns no errors.</p> <div data-bbox="172 779 1298 1278"><div><a href="#">Français</a><a href="#">Save</a><a href="#">Preview</a><a href="#">Contact Us</a><a href="#">Portfolio</a><a href="#">Help</a><a href="#">Verify Page</a> <a href="#">Search</a><a href="#">Instructions</a><a href="#">Canada Site</a><a href="#">Exit</a></div><div><div>Verification Report - Module</div><div><div>Close</div><div>Passed verification, all business rules and mandatory fields are completed. However, you must also click on the "Verify" button on the Portfolio before your form can be considered verified.</div><div>Partner organizations are expected to support activities of the formal partnership by sharing in intellectual leadership or providing expertise. The partner organization is also expected to provide in-kind and/or cash contributions.</div><div>A partner is an organization that participates actively in a formal partnership and contributes in a meaningful way to the success of the endeavour. A partner organization may be, for example, a Canadian or foreign: postsecondary institution, government department (federal, provincial, territorial, municipal), for-profit or not-for-profit organization, or foundation. After the data is saved, the system will generate an email to each person, inviting them to participate in the application.</div></div><div><a href="#">New Page</a></div></div><div>99 days 10 hr 41 min to deadline date</div><div>Page 1</div></div> <p data-bbox="83 1318 1341 1433">If a partner makes changes after the form was Submitted, the entry for that partner will return to <i>Invitation accepted but not yet verified</i> (PD4). You, together with the respective partner, need to follow again all the steps between PD4 and PD7.</p>	

Invite Partners – Other Actions	Accept Invitation as Partner – Other Actions
<p>If a partner did not receive the invitation email or lost it, you can resend it at any step from PD3 to PD6. For example, at step PD3:</p> <div data-bbox="384 362 1212 553"><div>Invitation not yet accepted</div><div>Family name <input type="text" value="Di Gaetano"/> (30 chars)</div><div>Given name <input type="text" value="Stefani"/> (30 chars)</div><div>Invitation E-mail sent to <input type="text" value="Stefani.DiGaetano@SSHRC-CRSH.GC.CA"/> <a href="#">Resend E-mail</a> </div></div>	
<p>At any stage in the process above, you can remove a partner from your application:</p> <div data-bbox="209 751 1244 1268"><div>Application - Invited Partner Organizations (Mandatory)</div><div>List the family name, given name, and email address for each partner organization. Partner organizations are required, for a successful application, to have a contact person who will act as a contact person. A partner organization is expected to share in intellectual leadership or providing expertise. The organization is expected to contribute to the success of the project and contributes in a meaningful way to the project. For example, a Canadian or foreign: postsecondary institution (university or college), for-profit or not-for-profit organization, or foundation. The contact person, inviting them to participate in the application.</div><div><div>Message from webpage</div><div>You have clicked on Clear Entry. Click OK to clear the entry and save your changes. Click Cancel to stop the Clear Entry.</div><div><div>OK</div><div>Cancel</div></div></div><div><div>New Page</div><div>1 of 1</div><div>Status <b>Form completed</b></div><div><a href="#">View form</a></div><div>Family name <input type="text" value="Di Gaetano"/> (30 chars)</div><div>Invitation E-mail sent to <input type="text" value="Stefani.DiGaetano@SSHRC-CRSH.GC.CA"/> <a href="#">Resend E-mail</a> </div><div><a href="#">Clear entry</a> </div></div><p>When you click <b>OK</b>, the content of the form is deleted and the partner receives an automated email.</p></div>	<p>If the Project Director removes a partner from the application, the Partner Organization’s contact person will receive the following automated email:</p> <p><b>Subject:</b> Invitation to participate has been cancelled</p> <p>This is an automated E-mail message. Please do not reply.</p> <p>You have been invited and have accepted to participate on a "Partnership Grants – Stage 1" application. [Project Director name] has removed you from the form.</p> <p>You are no longer required to participate on this application. This invitation has been removed from your Portfolio and from our database.</p> <p>For additional information, contact [Project Director name] at [Project Director email].</p>

