## PG Stage 2 October 2022 competition – Partner Invitation Process

|                          | Project Director – Invite Partners  | Partner organization – Accept Invitation as Partner |
|--------------------------|---|---|
| Project Director (PD) 1. | Once in the application form, go to the Invited Partners Module and read the  |   |
| Instructions:            |   |   |
|                          | Protocoldin Country   |   |
| SSHRC=CRSH               | Institution Contact Us Help Search  |   |
|                          | Application - Ic Preview Portfolio Verify Page Instructions   |   |
|                          |   |   |
| Activity Details         | When required, iden   |   |
| Previous Funding         | box provided.   |   |
| Co-applicants with CV    | Partnership Grants  |   |
| Participants             | Fur Application - Invited Partner Organizations (Mandatory)   |   |
| Invited Partners         |   |   |
| Summary                  | It ist the family name and E-mail address of the contact person for each partner organ  |   |
| 1                        |   |   |
| DD2 List the name of     | d amail address of the contact nervon for each nertner errorization and   |   |
| PD2. List the name an    | id email address of the contact person for each partner organization and  |   |
| click Save (you do not   | need to add all the partners at once; partners can be added at a later  |   |
| time). Français          | Contact Us Help Search Canada Site  |   |
| Save                     | Preview Portfolio Verify Page Instructions Exit   |   |
|                          |   |   |
|                          |   |   |
|                          | Partnarchin Grants 00 days 1  |   |
|                          | Institution to dead   |   |
| rolvement ↑              | Application - Invited Partner Organizations (Mandatory)   |   |
| ormation                 | List the family name and E-mail address of the contact person for each partner organization. Partner organiza   |   |
|                          | expected to support activities of the formal partnership by sharing in intellectual leadership or providing exper   |   |
| ig<br>ith CV             | organization is also expected to provide in-kind and/or cash contributions.   |   |
|                          | A partner is an organization that participates actively in a formal partnership and contributes in a meaningful \<br>success of the endeayour. A partner organization may be, for example, a Canadian or foreign; postsecondary |   |
|                          | government department (federal, provincial, territorial, municipal), for-profit or not-for-profit organization, or fo   |   |
|                          | The data is saved, the system will generate an email to each person, inviting them to participate in the applic   |   |
| scription                | New Page  |   |
| ion                      | New Entry   |   |
| es 🕆                     | Given name Stefani (30 chars)   |   |
| rtnership                |   |   |
| S ↑                      | E-mail Stefani.DiGaetano@SSHRC-CRSH.GC.CA (100 chars)   |   |
|                          |   |   |
|                          |   |   |

| Project Director – Invite Partners  |  | Partner organization – Accept Invitation as Partner   |
|---|--|---|
| PD3. After you click Save, the system will generate an email for each person, inviting them to participate in the application.  | Partner (P) 1. The con<br>when invited by the P  | tact person for the Partner Organization receives an automated email<br>D to participate:   |
| Invitation not yet accepted         Family name       Di Gaetano         Given name       Stefani         (30 chars)  | Subject: Invitation to<br>This is an automated I<br>You have been invited<br>and Humanities Resea<br>Applicant Informati | participate on an application<br>E-mail message. Please do not reply.<br>I to participate on an application to be submitted to the Social Sciences<br>arch Council (SSHRC) - Partnership Grants<br>on |
| Invitation E-mail sent to Stefani.DiGaetano@SSHRC-CRSH.GC.CA Resend E-mail  Clear entry   | Applicant: [Name Pro<br>E-mail: [Email Project<br>Funding Opportunity:   | ject Director]<br>t Director]<br>Partnership Grants   |
| (If you add new partners at a later time, when you click Save, the system will generate emails<br>only for the partners recently added; the partners already invited will not receive a second<br>email.) | Application deadline<br>Click here to accept o<br>If the link toes not we<br>[system generated link                      | date (ET): 31/10/22 8:00 PM<br>r decline the invitation to participate on an application.<br>ork, you can copy and paste the following address into your browser:<br>x]                               |
| Until the partner accepts the invitation, the entry will be listed as <i>Invitation not yet accepted</i> .  | The link above is the We suggest you book  | only way to access this form. DO NOT DELETE this E-mail. mark this link.  |
|   | P2. The Partner Orgar email and arrives on t   | nization's contact person follows the link provided in the automated his page:  |
| PD4. When the partner clicks on the hyperlink at step P2, the entry will be listed as <i>Invitation</i>   |  | Applicant Information   |
| accepted but not yet verified.  | Name   | Stefani Di Gaetano  |
| Status Invitation accepted but not yet verified   | E-mail   | stefani.digaetano@sshrc-crsh.gc.ca  |
|   | Application Deadline:  | 2021-10-29 20:00:00.0   |
| Invitation E-mail sent to Stefani.DiGaetano@SSHRC-CRSH.GC.CA Resend E-mail  | Form   | Click here to view your form  |
| Clear entry   | Click here to access and o   | complete the Partner Organization form.   |
|   | Click here to decline the in   | ivitation to participate in this application.   |
|   | Click on hyperlink (red  | arrow) to complete the Partner Organization form.   |

| Project Director – Invite Partners  | Partner organization – Accept Invitation as Partner   |
|---|---|
|   | P3. Once in the Partner Organization form, the Modules to complete can be found on the left   |
|   | side: Partner Information, Letter of Engagement, Contributions and Submit:  |
|   | Français         Contact Us         Help         Search         Canada Site           Preview         Portfolio         Instructions         Exit   |
|   | SSHRC-CRSH     99 day<br>to day<br>to day       Application Summary     Application Summary       Partner Information     Exter of Engagement*       Contributions     Funding opportunity Partnership Grants |
|   | Submit     Grant type Institution       Application Title   |
|   | Electronic ttachment     Applicant     Family name Popovici     Given name Paula     Organization     Department/Division   |
|   | Lead Organization<br>Organization<br>Department/Division  |
|   | Organization<br>Department/Div/sion   |
|   | P4. After completing the Partner Information, Letter of Engagement, and Contributions   |
|   | Modules, the Partner Organization's contact person goes to the Submit Module and clicks on  |
| 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> :                         | Partner Information Submit  |
|   | Contributions You must successfully verify your form (all mandatory fields must be complete) before you can submit it to SSHBC  |
|   | Click here to verify your form.   |
| View form   | Electronic Attachment     Preview     Instructions     Exit   |
| Family name Di Gaetano (30 chars)   | When the verify your form returns no more errors, the contact person arrives on this page:  |
| Invitation E-mail sent to Stefani.DiGaetano@SSHRC-CRSH.GC.CA Resend E-mail                | SSHRC=CRSH<br>Application Summary   |
| Clear entry   | Partner Information Letter of Engagement Contributions Your form is now verified (all mandatory fields are completed).  |
|   | Electronic Attachment     Submit  |

| Project Director – Invite Partners   | Partner organization – Accept Invitation as Partner  |
|--|--|
| PD6. When the partner submits the form at step P5, the entry will be listed as <i>Form</i>   | P5. Submit the form  |
| completed:   | Your form is now verified (all mandatory   |
| Status Form completed View form  | Submit   |
| Family name Di Gaetano (30 chars)  |  |
| Invitation E-mail sent to Stefani.DiGaetano@SSHRC-CRSH.GC.CA Resend E-mail   | 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. |
| PD7. When all the partners have accepted their invitations, verified and submitted the click Verify Page until it returns no errors.   | eir forms,   |
| Français         Contact Us         Help         Search         Canada Site           Save         Preview         Portfolio         Verify Page         Instructions         Exit   |  |
| Verification Report - Module 99 days 10 hr 41 min<br>to deadline date  | n  |
| olvement ormation 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.  |  |
| gr     expected to support activities of the formal partnership by sharing in intellectual leadership or provide expertise. The participate organization is also expected to provide in-kind and/or cash contributions.     A partner is an organization that participates actively in a formal partnership and contributes in a meaningful way to the success of the andeavour. A partner organization may be for example, a Canadian or foreign: posterondary institution. | partner  |
| government department (federal), provincial, territorial, municipal), for-profit or not-for-profit or organization and the data is saved, the system will generate an email to each person, inviting them to participate in the application.   | After  |
| mes <u>New Page</u> P  | Page 1   |
| If a partner makes changes after the form was Submitted, the entry for that partner we to <i>Invitation accepted but not yet verified</i> (PD4). You, together with the respective partner to follow again all the steps between PD4 and PD7.  | rill return<br>tner,   |

| Project Director – Invite Partner: Other Actions  | Partner organization – Accept Invitation as Partner: Other Actions  |
|---|---|
| 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:<br>Invitation not yet accepted<br>Family name Di Gaetano (30 chars)<br>Given name Stefani (30 chars)<br>Invitation E-mail sent to Stefani.DiGaetano@SSHRC-CRSH.GC.CA Resend E-mail   |   |
| At any stage in the process above, you can remove a partner from your application:<br>Application - Invited Partner Organizations (Mandatory)<br>List the family we suge from we begge<br>who will act as a contact person. A partner organization i<br>required, for<br>a partner is a<br>success of the<br>government, the data is a<br>use a contact person. A partner organization i<br>a partner ship and contributes in a meaningful way to the<br>example, a Canadian or foreign: postsecondary institution<br>person, inviting them to participate in the application.<br>New Page<br>1 of 1<br>Status Form completed<br>View form<br>Family name Di Gaetano@SSHRC-CRSH.GC.CA Resend E-mail<br>Clear entry<br>When you click OK, the content of the form is deleted and the partner receives an automated<br>email. | If the Project Director removes a partner from the application, the Partner Organization's contact person will receive the following automated email:<br><b>Subject</b> : Invitation to participate has been cancelled<br>This is an automated E-mail message. Please do not reply.<br>You have been invited and have accepted to participate on a "Partnership Grants" application.<br>[Project Director name] has removed you from the form.<br>You are no longer required to participate on this application. This invitation has been removed<br>from your Portfolio and from our database.<br>For additional information, contact [Project Director name] at [Project Director email]. |