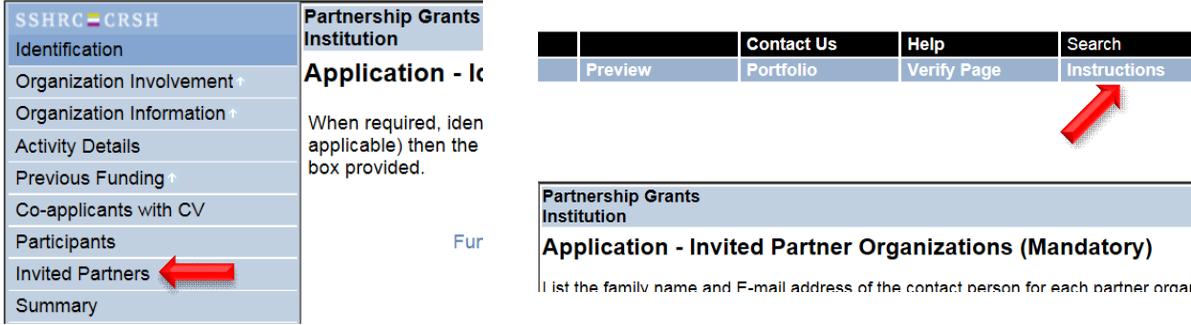


PG Stage 2 October 2022 competition – Partner Invitation Process

Project Director – Invite Partners	Partner organization – Accept Invitation as Partner
<p>Project Director (PD) 1. Once in the application form, go to the Invited Partners Module and read the Instructions:</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p>SSHRC-CRSH Partnership Grants Institution</p> <p>Application - Invited Partner Organizations (Mandatory)</p> <p>When required, identify the contact person for each partner organization (when applicable) then the box provided.</p> <p>List the family name and E-mail address of the contact person for each partner organization.</p> </div>	
<p>PD2. List the name and 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).</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p>Franglais Save Preview Contact Us Help Search Canada Site</p> <p>Partnership Grants Institution 99 days to deadline</p> <p>Application - Invited Partner Organizations (Mandatory)</p> <p>List the family name and E-mail address of the contact person for each partner organization. Partner organizations are required, for administrative purposes, to identify an individual who will act as a contact person. A partner organization is expected to support activities of the formal partnership by sharing in intellectual leadership or providing expertise. A partner organization is also expected to provide in-kind and/or cash contributions.</p> <p>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 for-profit business.</p> <p>New Page</p> <p>New Entry</p> <p>Family name <input type="text" value="Di Gaetano"/> (30 chars)</p> <p>Given name <input type="text" value="Stefani"/> (30 chars)</p> <p>E-mail <input type="text" value="Stefani.DiGaetano@SSHRC-CRSH.GC.CA"/> (100 chars)</p> </div>	

Project Director – Invite Partners

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

The screenshot shows a form with the following fields and elements:

- Status:** Invitation not yet accepted (indicated by a red arrow)
- Family name:** Di Gaetano (30 chars)
- Given name:** Stefani (30 chars)
- Invitation E-mail sent to:** Stefani.DiGaetano@SSHRC-CRSH.GC.CA (with a "Resend E-mail" link)
- Buttons:** "Clear entry" and a small circular icon with an upward arrow.

(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*.

Partner organization – 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
Application deadline date (ET):	31/10/22 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	Stefani Di Gaetano
E-mail	stefani.digaetano@sshrc-crsh.gc.ca
Application Deadline:	2021-10-29 20:00:00.0
Form	Click here to view your form

[Click here to access and complete the Partner Organization form.](#) (indicated by a red arrow)

[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*.

The screenshot shows the form with the following fields and elements:

- Status:** Invitation accepted but not yet verified (indicated by a red arrow)
- View form:** A link to view the form.
- Family name:** Di Gaetano (30 chars)
- Invitation E-mail sent to:** Stefani.DiGaetano@SSHRC-CRSH.GC.CA (with a "Resend E-mail" link)
- Buttons:** "Clear entry"

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	Preview	Contact Us	Help	Search	Canada Site
		Portfolio		Instructions	Exit

PD5. When the partner successfully verifies the Partner Organization form at step P4, the entry will be listed as *Invitation accepted and verified*:

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 the hyperlink (red arrow below) to verify the whole form:

When the **verify your form** returns no more errors, the contact person arrives on this page:

Project Director – Invite Partners

PD6. When the partner submits the form at step P5, the entry will be listed as *Form completed*:

The screenshot shows a form entry with the following details:

- Status:** Form completed (indicated by a red arrow pointing to the status text)
- View form:** A link to view the form.
- Family name:** Di Gaetano (30 chars)
- Invitation E-mail sent to:** Stefani.DiGaetano@SSHRC-CRSH.GC.CA (with a "Resend E-mail" link)
- Clear entry:** A button to clear the entry.

Partner organization – Accept Invitation as Partner

P5. **Submit** the form

The screenshot shows a confirmation message and a 'Submit' button:

- Submit:** A button to submit the form (indicated by a red arrow pointing to the button).
- Your form is now verified (all mandatory):** A confirmation message.

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 their forms, click **Verify Page** until it returns no errors.

The screenshot shows the 'Verify Page' button and a verification report:

- Verify Page:** A button to verify the page (indicated by a red arrow pointing to the button).
- Verification Report - Module:** A report showing the status of the verification. It includes a 'Close' button and a '99 days 10 hr 41 min to deadline date' timer.
- 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.**
- 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.**
- 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.**
- New Page:** A button to create a new page.
- Page 1:** The current page number.

If a partner makes changes after the form was Submitted, the entry for that partner will return to *Invitation accepted but not yet verified* (PD4). You, together with the respective partner, need to follow again all the steps between PD4 and PD7.

