Quick Reference Guide

Request for New Application/Proposal/Project

Information you need before you start . . .

- Requests for new Application/Proposal/Project are now completed through the Researcher Home Page (login).
- A Request for New Application/Proposal/Project is not required for a Notice of Award to a previously submitted and RSO-reviewed formal application. Contact your faculty-assigned Research Facilitator for further instructions.
- Applicable ethics and biohazards certifications or renewals must be in place for your project funds to become available; for more information review the RSO Certifications webpage.
- The Eligibility to Apply for and Hold Research Funding Policy defines who is eligible to apply for research funding and hold research projects at the University of Alberta. This Policy should be reviewed prior to proceeding.

Detailed instructions (for tutorial video, click here)

1. Login to your Researcher Home Page and click “Create Application/Proposal/Project”.
2. On the Create Proposal screen, click “Add”.
3. Description (Project Title): Enter your proposal or project title.
4. Request type: Select appropriate request type from the drop-down menu. “Studentship” should be selected if proposal is for a student stipend award or Postdoctoral fellowship award.
5. Principal Investigator (PI): Enter UofA PI ID, or Supervising Investigator (SI) ID if the proposal is for a studentship. The UofA Employee ID or the lookup field can be used to search by name.
6. Is PI the Project Holder: Select yes or no.
7. Project Holder ID: Defaults to PI if yes selected in #6 above. The Chair or Dean goes here if the PI is ineligible to hold or the proposal is a stipend or fellowship award.
8. Department: Autocompletes based on the project holder information entered in #7 above.
9. Start date: Enter your proposal or notice of award start date (if known).
10. End Dates: Enter your proposal or notice of award end date (if known).
11. Indirect Cost Requested: Select yes or no to indicate whether or not you have requested indirect costs in your budget. For details on indirect costs, please refer to the UofA’s Application for Indirect Costs Recovery Rates Procedure. If “no” is indicated, you must include a rationale in the box that appears. For additional details on indirect costs, contact your faculty-assigned Research Facilitator.
12. Source of Funds: Select Internal, External or Both.
13. For each source of funds, add a sponsor contact name and phone number (if known) and indicate total Award Amount.
14. Select appropriate currency if other than Canadian dollar.
15. Certification Info: Indicate yes or no for each category (Animal welfare, Human ethics, Biohazards and Stem Cells) to confirm the Certifications requirements for each category.
16. Keywords: This section is NOT required.
17. Additional University Resources: You must indicate yes or no for each category.
18. Honorarium or salary for the PI: You must indicate yes or no.
19. Does this research involve Aboriginal/Indigenous peoples, their communities or knowledge systems? You must indicate yes or no.

UofA Co-Investigators/students

- UofA Co-Investigators: The first line defaults to the PI as entered in step 5. Use the “+” icon to add an additional line for each UofA Co-Investigator. You can use the magnifying glass to search by name. The PI must ensure that the correct Co-Investigators are entered. All UofA Co-Investigators must sign the signature page so they must be added to the proposal request in this section. Do not add Non-UofA Co-Investigators in this section.

Intellectual Credit: This section is NOT required by RSO.

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22. Studentship Requests: The first line defaults to the SI as entered in step 5. Use the “+” icon to add additional lines as required for entering the student or Postdoctoral fellow UofA ID. The SI must ensure the correct ID is used. If the individual does not yet have a UofA ID, remove the Student line using the “-” icon and skip this step. The form will still print with a space for the individual to sign. Students and Postdoctoral fellows must sign the studentship/fellowship request.

23. The request form can be saved and returned to at any point in the steps outlined above. Please do not create a duplicate proposal request if you make an error. To correct errors after submitting the form, contact your faculty-assigned Research Facilitator.

24. Click Submit.

25. Click Print, sign and circulate for required signatures with a copy of your application.
Link: https://www.ualberta.ca/research/services/
**Request for New Application/Proposal/Project**

**PI Section**

- **Proposal ID:** NEXT
- **Version ID:**
- **Request Status:**

**Description (Project Title):**

- **Request Type:** Application/Proposal/New

- **Principal Investigator (PI):**
- **Is PI the Project Holder:** Yes

- **Department:**

- **Start Date:**

- **Source of Funds:**

**External**

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<th>Sponsor</th>
<th>Program</th>
<th>Sponsor Contact Name</th>
<th>Phone No</th>
<th>Amount</th>
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<tbody>
<tr>
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<td></td>
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**Internal Sponsor**

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<th>Program Name</th>
<th>Contact Name</th>
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**Internal Funding Source**

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<th>Speed/Chart Key</th>
<th>Fund</th>
<th>Department</th>
<th>Program</th>
<th>Class</th>
<th>Project</th>
<th>Sponsor</th>
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</tbody>
</table>

**Total Award Requested:** $0.00

**Award Currency:** CAD

**Certification Info**

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<th>Certification Code</th>
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<td>AUP</td>
</tr>
<tr>
<td>2 Human Ethics 01</td>
<td></td>
<td>PRO</td>
</tr>
<tr>
<td>3 Biomarkers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Stem Cell</td>
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</table>

**Key Word Detail**

<table>
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<th>Description</th>
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<tbody>
<tr>
<td>16</td>
<td>(Not required)</td>
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For studentship requests, UofA Co-Investigator(s) section will be replaced by this:

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<tr>
<th>Resource</th>
<th>Employee ID</th>
<th>Name</th>
<th>Department</th>
<th>Description</th>
<th>Faculty</th>
<th>Intellectual Credit (%)</th>
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<tr>
<td>1</td>
<td>0894763</td>
<td>Bill.Pi</td>
<td>610107</td>
<td>VPR Research Services (FICR)</td>
<td>610000</td>
<td>100.00</td>
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<tr>
<td>2</td>
<td>0610107</td>
<td>STONZ</td>
<td>610107</td>
<td>VPR Research Services (FICR)</td>
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Updated January 4, 2018