Requests are created through the Researcher Home Page as before, but once submitted, get routed electronically to department and faculty for online approvals. Please note:

- A new Request is not required for a Notice of Award to a previously submitted and RSO-reviewed application.
- Applicable certifications or renewals must be in place for project funds to become available.
- 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 (see annotated screenshots below)

1. To create a proposal request for online approvals, login to your Researcher Home Page through the RSO website and click “Create Application/Proposal/Project”.
2. On the Create Proposal screen, click “Add”.
3. Description (Project Title): Enter your proposal title.
4. Request type: Select appropriate request type from the drop-down menu. For new applications, select “Application/Proposal – New”. For a letter of intent, “Application/Proposal – LOI”. For student stipend or post-doctoral fellowship applications, select “Studentship”. If request type is “studentship”, online approvals will not be required from the student or post-doc.
5. Principal Investigator (PI): Autopopulates if PI is submitter. If submitter is not the PI, enter UofA employee ID for the PI or Supervising Investigator (SI) (for studentship). The magnifying glass can be used to search by name. Ensure you enter the correct employee ID if searching by name and there is more than one person with the same name.
6. Is PI the Project Holder: Select yes or no. The Chair or Dean is the project holder if the PI is ineligible to hold or the request type is “Studentship” (see #4).
7. Project Holder ID: Defaults to PI if yes selected in #6 above. If no is selected, enter the employee ID of the project holder. Use the magnifying glass to search by name.
8. Department: Autopopulates based on the project holder entered in #7. Online approval routing will go through the selected department and faculty.
9. Sponsor Deadline: Please enter the sponsor deadline. If there is no formal deadline please enter a date 5 business days from the current date.
10. Start date: Enter your proposal or notice of award start date if known.
11. End Dates: Enter your proposal or notice of award end date if known.
12. Indirect Cost Requested: You must include indirect costs in your budget in accordance with the UofA’s indirect costs procedure. If “no” is selected, you must include a rationale in the box that appears.
13. Source of Funds: Select Internal, External or Both. For external and internal sponsor, indicate total amount of funds coming to the UofA. You can also add the name and phone number of a contact person at the sponsor if known.
14. Internal funding source: This can be left blank if unknown. Can be edited by department and faculty reviewers/approvers.
15. Currency: Select appropriate currency if other than Canadian dollars.
16. Certification Info: Indicate yes or no for each category (Animal welfare, Human ethics, Biohazards and Stem Cells). Ensure certification attestations are accurately completed at this stage as this will trigger communication between the ARISE system and your Researcher Home Page.
17. Key Word Detail: This section is not required.
18. Additional University Resources: Identify any additional resources being committed by the University as part of this application and above the funds being requested from the sponsor (eg: a teaching assistantship, additional lab space etc). You must indicate yes or no in each category. Attach any supporting documentation (see #22).
19. Honorarium or salary for the PI: You must indicate yes or no.
20. Does this research involve Aboriginal/Indigenous peoples, their communities or knowledge systems?: You must indicate yes or no.
21. UofA Co-Investigator(s): 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. Ensure you enter the correct employee ID if there is more than one person with the same name. **All UofA Co-Investigator(s) must be added to the proposal request.** Do not add Non-UofA Co-Investigators. Intellectual credit is not a required field.
22. Attachments: Click on the paperclip to upload attachments. Your proposal request supporting documents (complete application/scope of work, letters or support, budgets, notice of award etc) must be attached for approvers to see and approve. The PI will be able to upload documents at their approval stage if PI is not the submitter. Attach documents as a single PDF.
23. Save: The request form can be saved and returned to at any point in the steps outlined above. To return to the proposal, simply log in to your researcher home page and search in the proposals section then click on the proposal number. Please do not create duplicate requests, contact your research facilitator for assistance.
24. Submit: Once you click submit, your request will be submitted into workflow for online approval.
25. NOTE: You no longer need to print the form and obtain physical signatures. The print button is still available but no longer needed to be used.
26. The workflow approval chain is displayed on the bottom of the request page can be tracked along the different levels of
### PI Section

**Proposal ID:** [Blank]

**Version ID:** V0

**Request Status:** [Blank]

**Description (Project Title):**

3

**Contact for Pickup:** [Blank]

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

**Principal Investigator (PI):** [Myra Hiymuix]

**Is PI the Project Holder:** Yes

**Project Holder ID:** [Myra Hiymuix]

**Department:** VP Research

**Faculty:** 010000

**VPR VP Research**

**Sponsor Deadline:** [Blank]

Unless otherwise specified, RSO has an internal deadline of 5 business days in advance of the sponsor deadline

**Start Date:** [Blank]

**End Date:** [Blank]

**Indirect Cost Requested:** Yes

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**Award Currency:** [Blank]

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