CANADA FOUNDATION FOR INNOVATION

Getting started with the CFI Awards Management System

An overview document for researchers

December 2024

INNOVATION
Canada Foundation for Innovation
Fondation canadienne pour l'innovation

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About the Canada Foundation for Innovation

With a bold, future-looking mandate, the CFI equips researchers to be global leaders in their fields and to respond to emerging challenges. Our investments in state-of-the-art tools, instruments and facilities at universities, colleges, research hospitals and non-profit research institutions underpin both curiosity- and mission-driven research that cuts across disciplines and bridges all sectors. The research infrastructure we fund mobilizes knowledge, spurs innovation and commercialization, and empowers the talented minds of a new generation.

The Canada Foundation for Innovation respectfully acknowledges that its head office is located on the traditional, unceded territory of the Anishinaabe Algonquin People.

1 Definitions

institution: CFI-eligible institution or an authorized representative acting on behalf of the institution.

institutional administrators: Individuals responsible for managing CFI projects on behalf of the institution. These individuals are responsible for pre-award and post-award activities.

pre-award activities: All activities related to applying for CFI funding, uploading supporting documents, collaborating with researchers to submit proposals, and viewing the funding decisions and review materials for proposals.

post-award activities: Encompasses all activities related to managing successful projects including award finalization, amendments, project progress reports and financial reports. This also includes managing the institution's Infrastructure Operating Fund (IOF) allocation and IOF annual reports.

project leader: Individuals mandated by the institution to lead CFI-funded projects.

reviewer: Individuals who participate in the review process of proposals submitted to the CFI.

2 Reference material

This guide is intended for researchers. Other guides are available, depending on your role and the type of activity you perform in CAMS.

Institutional administrator: If you are an institutional administrator, please refer to Getting started with CAMS: An overview document for institutional administrators.

Reviewers: If you are a reviewer, please refer to Getting started with CAMS: An overview document for reviewers.

3 What is CAMS?

The Canada Foundation for Innovation Awards Management System (CAMS) is the secure online portal that allows universities, colleges, research hospitals and non-profit research institutions to apply for CFI funding and assists them in managing the full life cycle of a CFI-funded project.

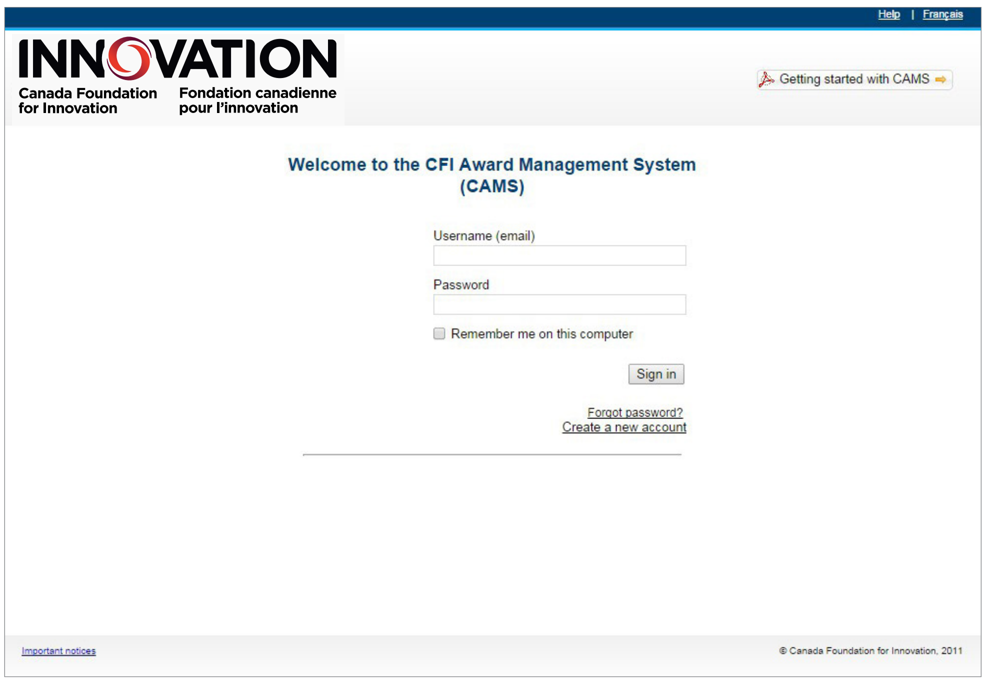
CAMS allows institutional administrators to manage pre-award and post-award activities related to CFI funding. It also allows researchers to prepare proposals for internal submission to the institution, as well as have access to information related to the projects they lead. Finally, CAMS gives reviewers access, in a single location, to the information and documentation necessary to assess the proposals assigned to them.

4 Access to CAMS

4.1 CAMS sign-in page

You can access CAMS as follows:

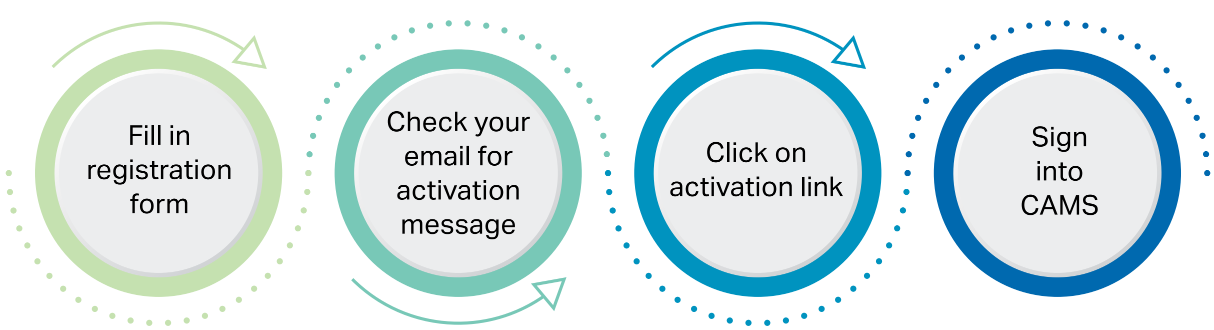
- Navigate to Innovation.ca
- Click the "CAMS" icon in the menu bar at the top right
- The CAMS sign-in page will appear.



On this page:

- Registered users can sign in
- Registered users who have forgotten their password can reset their password
- Researchers and institutional administrators can create a CAMS account.

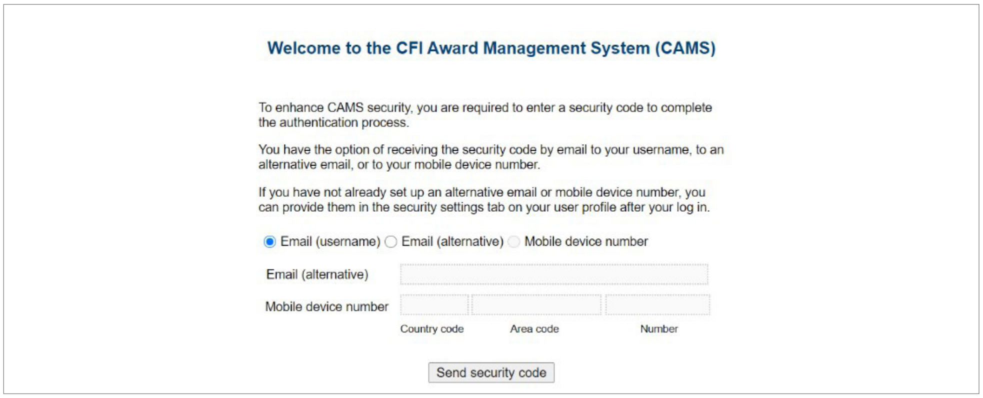
4.2 Account creation process



4.2.1 Creating a new account

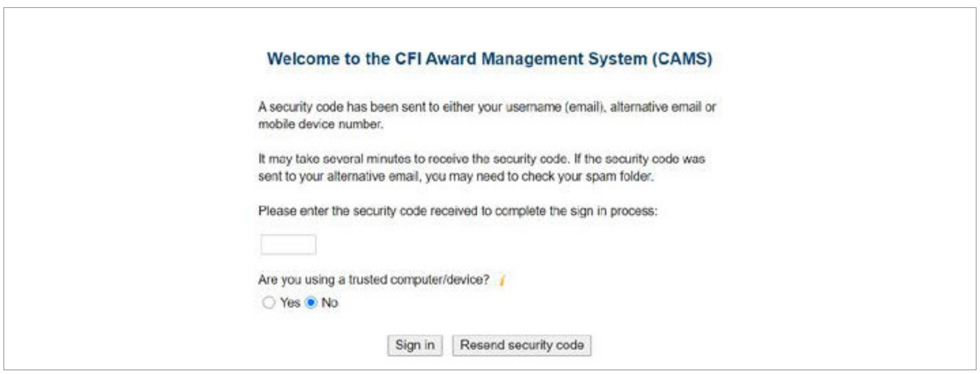
From the sign-in page, click "Create a new account" and follow the instructions.

4.3 Two-step verification



To enhance CAMS security, in addition to signing in using a username and password, you will be required to enter a security code to complete the authentication process.

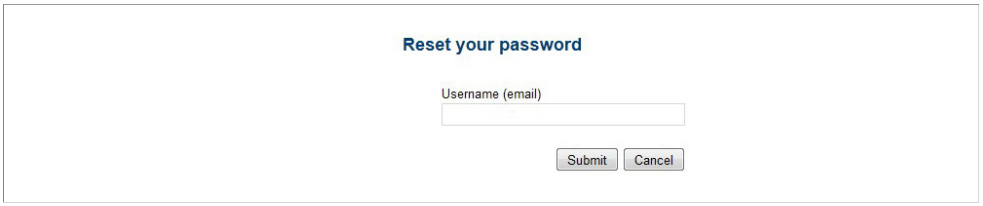
You have the option of receiving the security code by email to your username, to an alternative email or to your mobile device number.



When entering the security code, if you specify that your computer or device is trusted, you will not have to enter a security code again when using that device and browser. However, if you change devices or browsers, or clear your browser's cache, you will be required to use two-step verification when you sign in.

New users or users with a newly assigned institutional role will be prompted to set up a method of receiving security codes, either when creating a user account or when first logging into CAMS. You can modify the method of receiving security codes by navigating to the "My profile and preferences" screen.

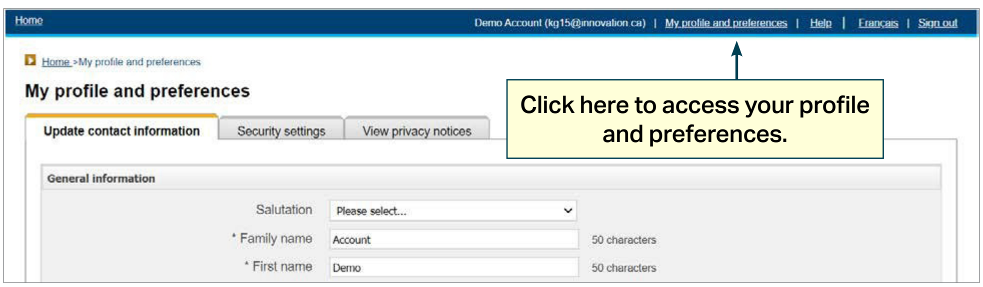
4.4 Resetting your password



If you have forgotten your password, you can request to have the password automatically reset by clicking "Forgot password?" on the sign-in page. You will be required to provide your username (email address). You will receive an email with a unique password reset link. Once you click on the link, you will be required to create a new password. If you require assistance, please contact the CFI help desk at help@innovation.ca.

4.5 Accessing user profile and preferences

These pages allow you to manage your contact information, security settings and password, as well as to view privacy notices from the CFI.



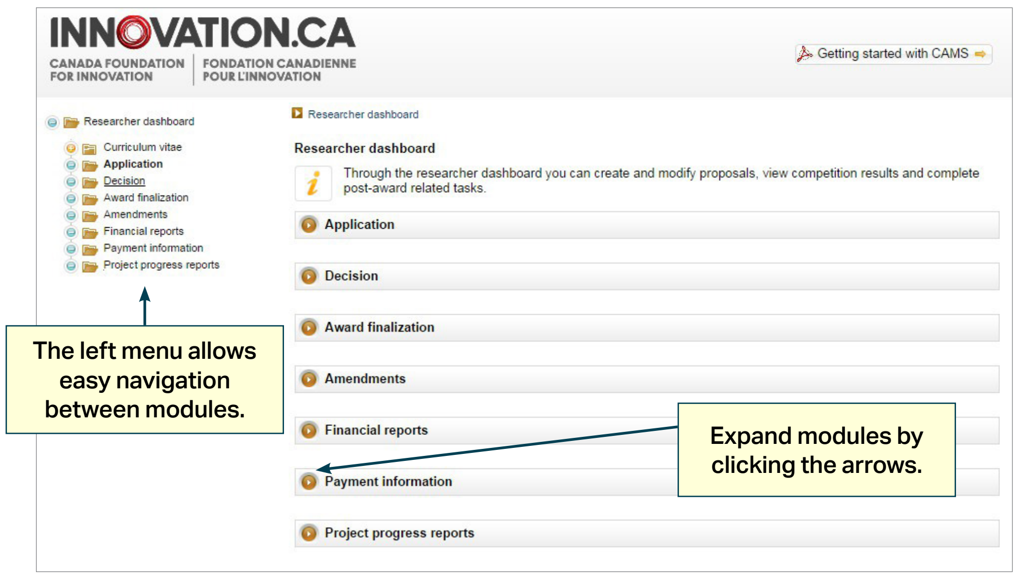
5 The researcher dashboard

5.1 Overview

Once signed in as a researcher in CAMS, you are automatically directed to your researcher dashboard. The dashboard contains easy access to information related to your role(s) in a project (e.g., key participant, collaborator, project leader, etc.).

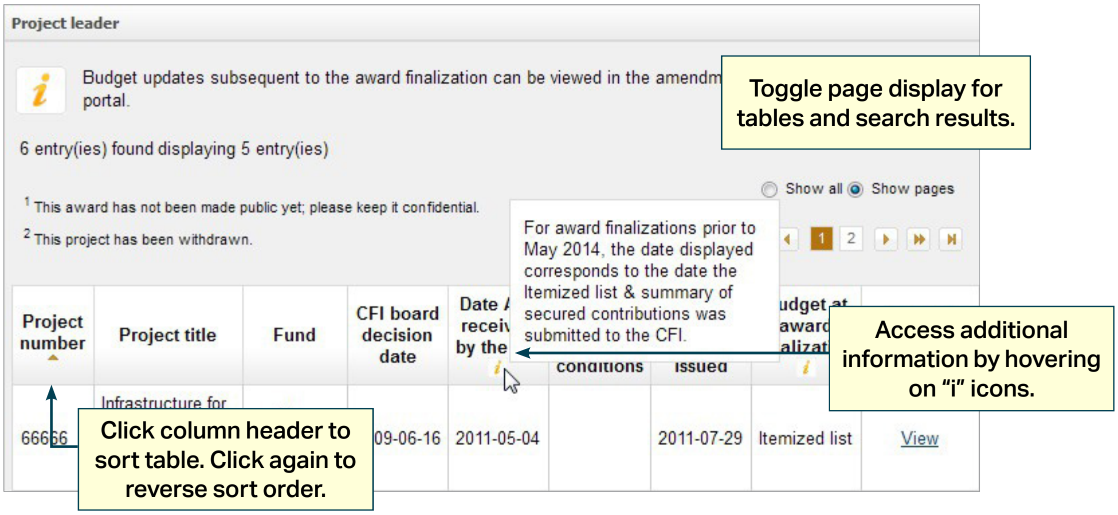
5.2 Navigation

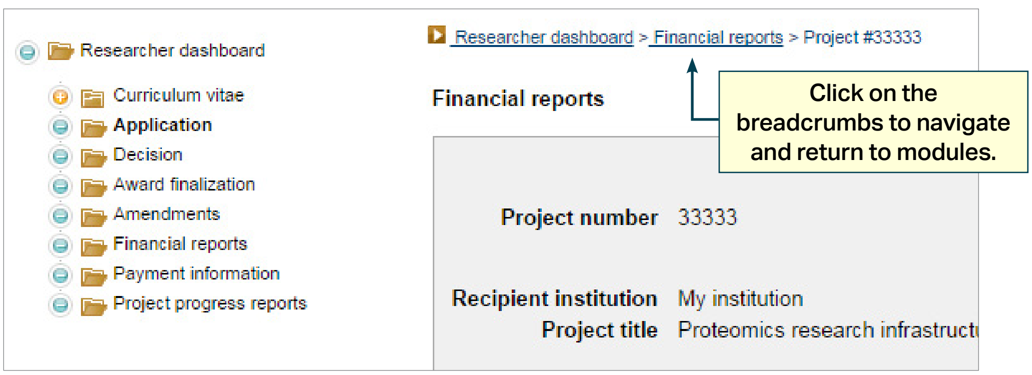
The researcher dashboard contains a number of sections. The following image describes these sections and illustrates their functionalities.

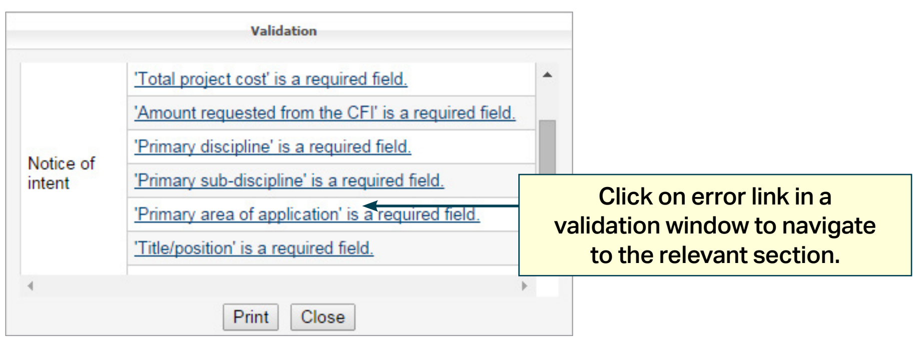


Note: You may not see all the sections displayed above. The sections displayed on your researcher dashboard will depend on the access privileges granted to you by your institution.

A number of features are available in most CAMS modules that can help you navigate between screens or provide contextual information for certain fields.



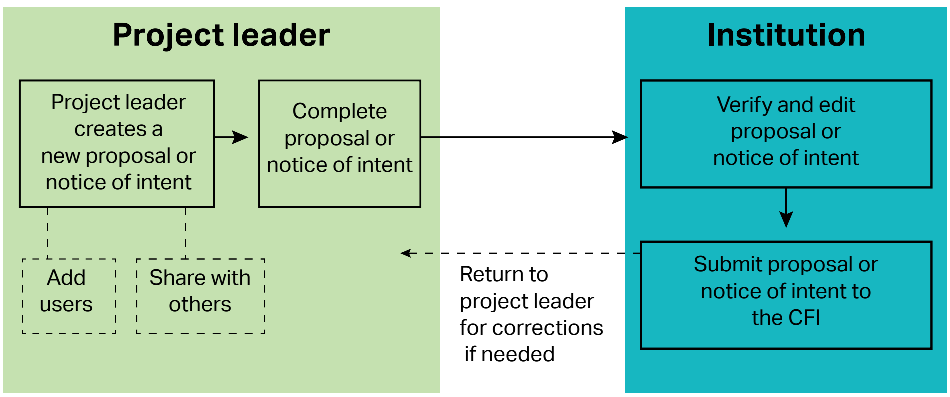




6 The application process

The process to submit a notice of intent or proposal to the CFI typically involves three steps:

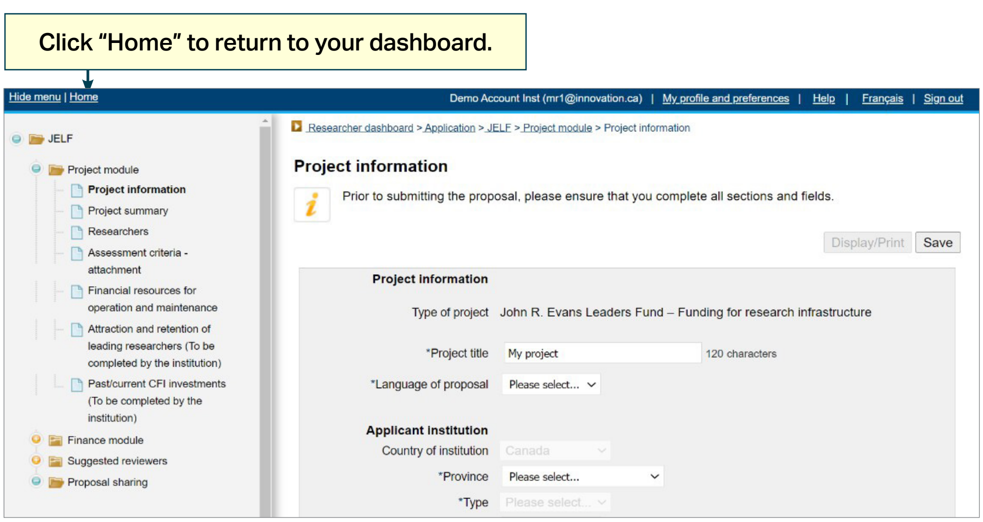
1. The project leader creates a new notice of intent or proposal and completes the forms online. Once the project leader has marked the form as complete, they will no longer have access to modify it. Institutional administrators with appropriate access can also complete the forms online on behalf of the project leader.
2. The institution may edit the form and/or release it back to the project leader for revision. When the notice of intent or proposal is deemed final, the institution indicates that the form has been verified. If applicable, the system will then generate the final PDF version of the notice of intent or proposal.
3. An authorized institutional administrator then submits the notice of intent or proposal to the CFI.



Application process

Note: For more information on the application process, refer to the specific instructions for each fund available through the "Funding opportunities" page of Innovation.ca.

6.1 Navigating within the proposal form



6.2 Guidelines for attachments

6.2.1 Pagination

CAMS will automatically paginate notices of intent and proposals when they are submitted. Documents **should not** be individually paginated prior to being uploaded to the electronic system.

6.2.2 Page formatting

Since reviewers will assess proposals electronically, the applicant should only use a standard, single column on an 8.5″ x 11″ page layout for documents. Avoid using a two-column or landscape format since it may reduce legibility.

The notice of intent and proposal must be clear and easily readable. Legibility is of paramount importance and should take precedence in the selection of an appropriate font for use in the notice of intent and proposal. The applicant is strongly encouraged to use a 12-point, black font and use single line spacing (six lines per 2.5 cm (1 inch) with no condensed type or spacing.

Additionally, the CFI expects documents to conform to the following guidelines:

- **Header:** Indicate the administrative institution on the top left, the title of the section in the middle and the project number on the top right of each page.
- **Footer:** Do not include any information in the footer as this area will be used for automatic page numbering.
- **Page margin:** Insert a margin of no less than 2.5 cm (1 inch) around the page. The header may be within the margin.
- **File format and size:** Only PDF files may be uploaded. Documents in other formats should be converted to PDF prior to being uploaded and should not be encrypted or password protected. The file size must not exceed 20 megabytes.

Adherence to the page formatting guidelines noted above is necessary to ensure that the reviewers receive legible proposals and that no applicant will have an unfair advantage by using smaller type, line spacing or margins to provide more text in the notice of intent or in the proposal. Failure to adhere to these guidelines may result in the CFI returning a proposal for revision.

6.3 Notice of intent structure

Notices of intent will be used to assist the CFI in planning the review process, identifying the requisite expertise for the assessment of each proposal, recruiting committee members, and detecting potential eligibility issues with the infrastructure items requested. Therefore, notices of intent should contain accurate information about the infrastructure and its users, the proposed research or technology development and the expected outcomes.

Applicants will not be able to change the name of the project leader or administrative institution once a notice of intent is completed. That is because the CFI uses notices of intent to assemble review committees and changes to the project leader or administrative institution may result in a conflict of interest for a review committee member. **If such a change is deemed necessary, contact your Senior Programs Officer as soon as possible. The CFI will oversee the change to be made in CAMS.**

6.3.1 Project information

This section captures basic information about the project such as the title, administrative institution, keywords and research security information.

You may need to provide other documents as well, depending on your answers to the research security questions (see sections 6.3.3 and 6.3.4).

6.3.2 Collaborating institutions

Identify the institutions eligible for CFI funding collaborating in this project. Enter the amount to be provided from each collaborating institution's envelope for this competition. Do not include in this list the administrative institution identified in the "Project information" section.

6.3.3 Principal users/team members

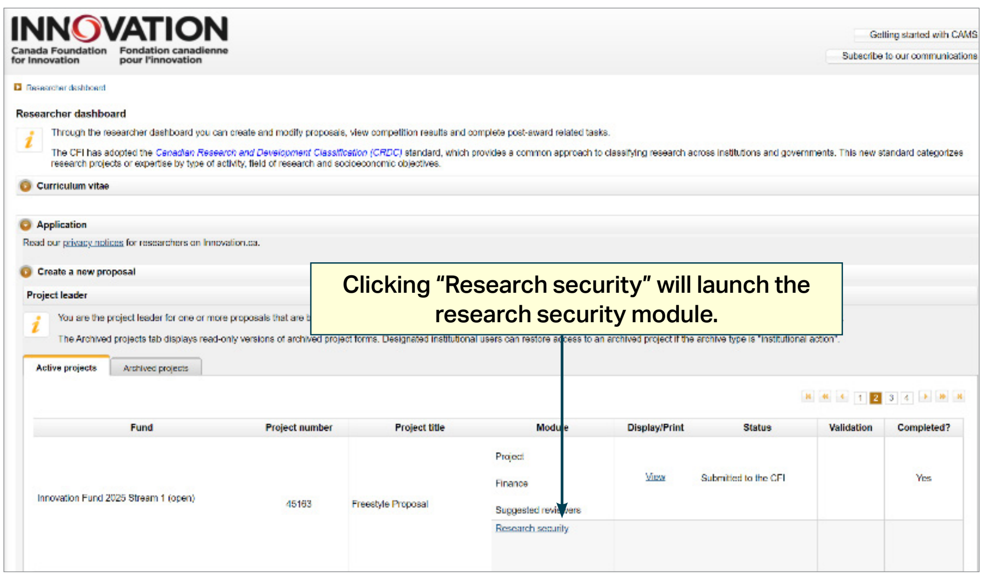
List the principal users of the infrastructure requested, including the project leader. Principal users must have a CAMS account and sign in to accept to participate in the project before a notice of intent can be submitted to the CFI. Researchers listed as principal users automatically gain read access to the notice of intent and proposal.

If the project aims to advance a sensitive technology research area (according to the answer you give in the project information section), all team members must complete a CFI attestation form for Sensitive Technology Research and Affiliations of Concern (STRAC) in CAMS before they can accept to participate in the project (see section 6.3.4).

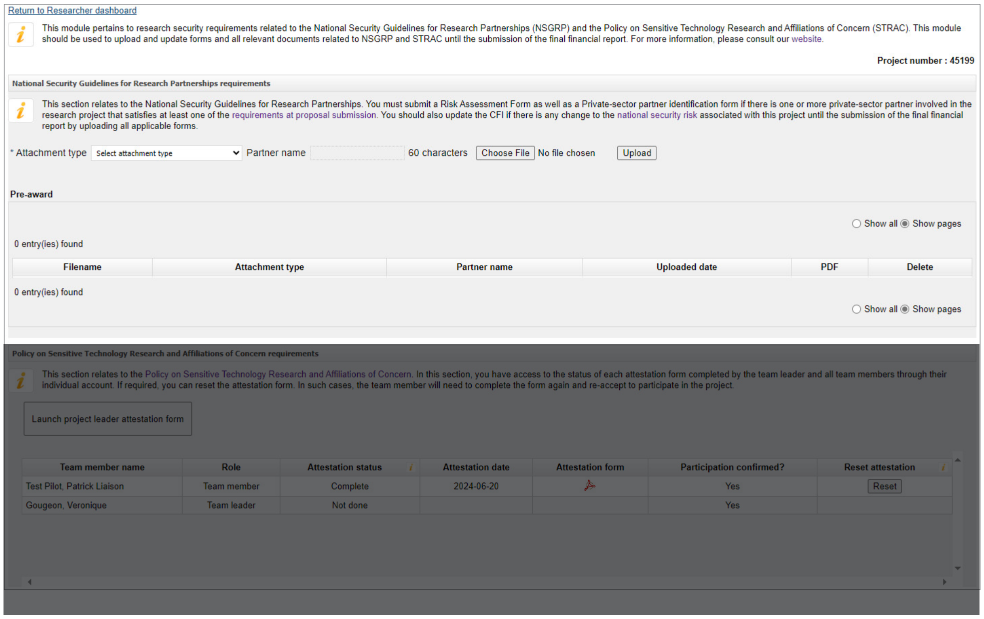
6.3.4 Research security

The research security module will be visible if the answer to any of the research security questions in the "Project information" section of the notice of intent is "yes." For information on the research security requirements, please consult our website.

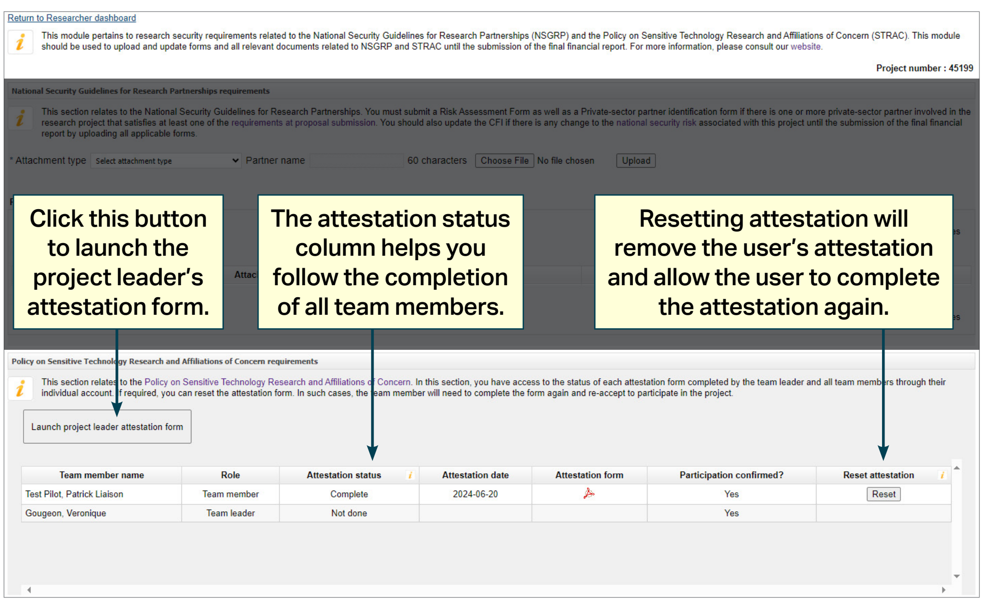
From the researcher dashboard, you can access the research security module by clicking the link below.



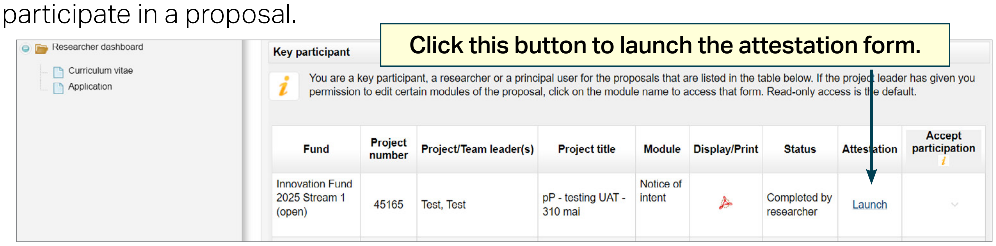
If the answer to the first research security question in the project information section is “yes,” meaning that the project involves at least one private-sector partner that meets the described criteria, you must upload a Risk Assessment Form (RAF) and one or more private-sector partner identification forms using the top portion of the research security module. You can complete these forms at any time, but you don’t have to submit them until the proposal stage.



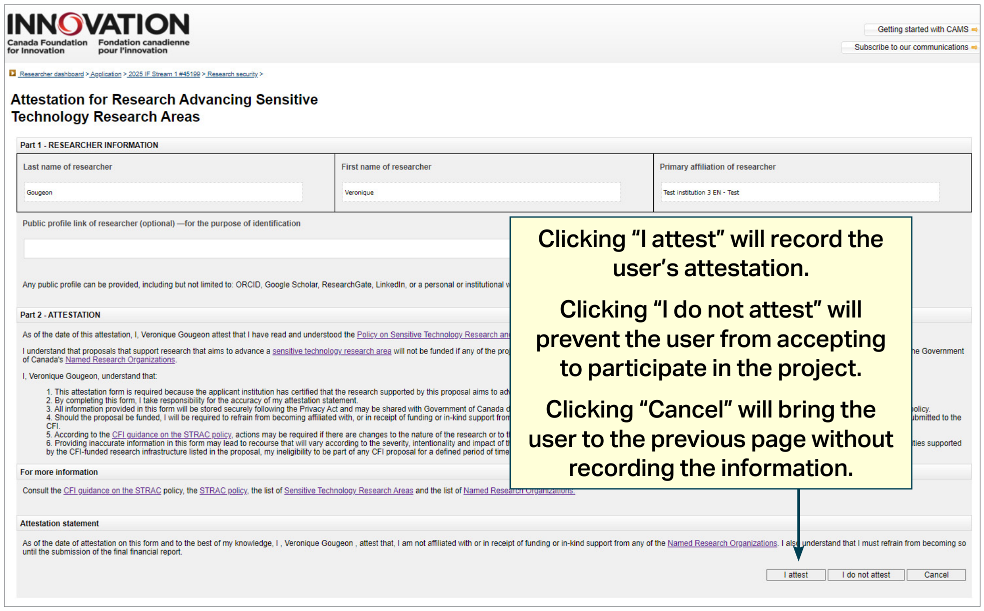
If the answer to the second research security question in the project information section is “yes,” meaning that the project aims to advance a sensitive technology research area, the project/team leader must use the bottom portion of the research security module to complete the CFI STRAC attestation form. This portion of the module also allows you to monitor whether other team members have completed the forms.



Other team members will get access to the CFI STRAC attestation form in the same screen where they accept to participate in a proposal.



Launching the attestation form allows you to complete the form.



6.3.5 Project description (page limit varies by competition)

Provide a description of the major pieces of infrastructure requested, a short overview of the research or technology development activities to be enabled by the infrastructure, and the anticipated outcomes from these activities, including expected application(s).

Also use this section to clearly indicate if the proposal will include advanced research computing infrastructure. Similarly, specify if the proposed location of the infrastructure project would be either a national or international research facility. In both such cases, the institution must consult with the host facility, comply with the facility's established planning and project approval processes, and obtain the approval of the host facility.

6.3.6 Suggested reviewers

Identify a minimum of six reviewers who are well-qualified to review the proposal and who are not in a position of conflict of interest. A conflict of interest may be deemed to exist or perceived as such when reviewers:

- Are a relative or close friend, or have a personal relationship with the project leader or one of the principal users
- Are in a position to gain or lose financially/materially from the funding of the proposal
- Have had long-standing scientific or personal differences with the project leader or one of the principal users
- Are currently affiliated with the project leaders' or the principal users' institutions, organizations or companies — including research hospitals and research institutes

- Are closely professionally affiliated with the project leader or one of the principal users, as a result of having in the last six years:
  - Frequent and regular interactions with the project leader or one of the principal users in the course of their duties at their department, institution, organization or company
  - Been a supervisor or a trainee of the project leader or one of the principal users
  - Collaborated, published or shared funding with the project leader or one of the principal users, or have plans to do so in the immediate future
  - Been employed by the administrative institution
- Feel for any reason unable to provide an impartial review of the proposal. Note: The decision whether to contact the suggested reviewers remains with the CFI.

6.4 Proposal structure

The proposal should clearly present the merits and excellence of the proposed project. Sufficient information should be provided to enable reviewers to evaluate the proposal in accordance with the assessment criteria established by the CFI (please refer to the Assessment criteria section for the competition).

If the submission of a notice of intent was required, CAMS automatically populates the proposal with information provided in the notice of intent including the following: project information, collaborating institutions, principal users and suggested reviewers. Applicants will not be able to change the name of the project leader or administrative institution once the notice of intent is completed. This is because the CFI uses the notices of intent to assemble review committees and a change to the project leader or administrative institution may result in a conflict of interest for a review committee member. **If such a change is deemed necessary, contact your Senior Programs Officer as soon as possible. The CFI will oversee the change to be made in CAMS.**

Applicants are able to revise the details of the collaborating institutions, principal users, research security questions and suggested reviewers to reflect changes from the time of the notice of intent submission. However, we ask that you inform your Senior Programs Officer as soon as possible if any changes are made to the aforementioned lists.

The proposal consists of four separate CAMS modules:

- **Project module:** Information about the proposed project, how it meets the objectives and criteria of the competition
- **Finance module:** Information about the budgetary details of the proposal
- **Suggested reviewers module:** List of potential reviewers of the proposal
- **Research security module:** Information about research security requirements

The forms in CAMS will dictate the maximum number of characters that can be included in each section and/or the page limits for uploaded documents.

6.5 Project module

6.5.1 Project information

This section captures basic information about the project such as the title, administrative institution, keywords and research security information. The information in this section is automatically populated with information if it was provided in a notice of intent.

You might need to submit other documents as well, depending on your answers to the research security questions (see sections 6.5.4 and 6.8).

6.5.2 Plain language summary

Provide a short summary in plain language of the proposed project: what is being researched, how it is being done and why it is important. Focus on the expected impacts and benefits to Canada, beyond academic accomplishments. This summary will not be used in the review process. Should the project be funded, it may be used in the CFI's communications products and website.

6.5.3 Project summary

In language appropriate for a Multidisciplinary Assessment Committee (MAC), provide a general description of the research or technology development activities to be undertaken and a general overview of the infrastructure being requested. This summary must concisely address the extent to which the proposal meets the competition objectives.

6.5.4 Principal and other users/team members

The list of principal users/team members is prepopulated if a notice of intent was required. Newly added principal users must have a CAMS account and accept to participate in this project before a proposal can be submitted to the CFI. The CVs of the principal users will be appended to the proposal. Researchers listed as principal users automatically gain read access to the proposal.

If the project aims to advance a sensitive technology research area (according to the answer you give in the project information section), all team members must complete a CFI STRAC attestation form in CAMS before they can accept to participate in the project.

6.5.5 Collaborating institutions

Identify the institutions eligible for CFI funding collaborating in this project. The list of collaborating institutions should be filled out prior to completing the Finance module. The choice of infrastructure location in the Cost of individual items section of the Finance module will be populated based on this list. Do not include in this list the administrative institution identified in the Project information section.

6.5.6 Financial resources for operation and maintenance

This section of the Project module captures the annual costs and sources of committed support to ensure the effective operation and maintenance of the infrastructure for the first five years after implementation.

In cases where the useful life[1] of some of the infrastructure items requested are longer or shorter than five years, the assessment criteria section of the proposal should provide complementary information regarding the operating and maintenance needs for these items over their useful life.

Do not include costs related to research and/or technology development. If funding sources include the CFI's Infrastructure Operating Fund (IOF), list this in the "institutional contribution" category.

6.5.7 Assessment criteria

Upload a PDF document that contains key information on how the proposal meets the objectives and assessment criteria for the competition. Ensure that the document follows the guidelines for attachments (section 6.2).

Each assessment criterion will be evaluated against a standard. Each criterion includes aspects that must be addressed in the proposal. Failure to do so will weaken the proposal.

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1 The useful life of the research infrastructure is considered to be the period of time over which the infrastructure is expected to provide benefits and be usable for its intended purpose as per the proposal, factoring in normal repairs and maintenance.

The document allows the applicant maximum flexibility to address each criterion, including the use of figures or diagrams, where appropriate. The distribution of pages among criteria is at the applicant's discretion, up to the total page limits.

6.6 Finance module

The Finance module consists of the following sections:

- Cost of individual items
- Construction or renovation plans (if applicable)
- Contributions from eligible partners
- Infrastructure utilization
- Overview of infrastructure project funding (generated automatically)

The tables in the Overview of infrastructure project funding section in CAMS will be automatically populated with information taken from the other sections of the Finance module. Note that the amount requested from the CFI is calculated based on the difference between the total contributions from eligible partners and the total eligible costs.

6.6.1 Cost of individual items

When completing the Cost of individual items section, the CFI recommends that the applicant bundle items into functional groupings. However, details and justification for each item within a group should be provided in addressing the infrastructure criterion in the Assessment criteria document. The CFI's Policy and program guide outlines the eligible costs for infrastructure projects.

List only the eligible infrastructure acquisition and development costs. List the full cost of each item. Retain documentation (price lists, quotes, etc.) so that you can provide it to the CFI upon request.

Please note:

- If the infrastructure will be used for purposes other than research or technology development, list only pro-rated research or technology development costs.
- The total eligible costs must include taxes (net of credits received), shipping and installation. However, taxes must not be calculated on the in-kind portion.
- When preparing budget estimates, the applicant must follow their existing institutional policies and procedures. Costs included in this budget must be close estimates of fair market value. Refer to the Policy and program guide for information on how in-kind contributions must be assessed.

6.6.2 Construction or renovation plans

All proposals that include construction or renovation must provide the following information:

- A detailed breakdown of the overall cost of the construction or renovation project, categorized by cost component (i.e., direct, soft and contingency costs);
- A timeline identifying key dates for the various stages of the proposed construction or renovation;
- Floor plans of the proposed area(s), showing the location of the infrastructure and the scale of the plans for projects involving multiple rooms. The floor plans must be legible when printed in black and white on standard letter size paper (8.5" x 11").

Note: The cost breakdown, timeline and floor plans should be uploaded as a separate PDF document. These pages do not count towards the page limit for the Assessment criteria section of the proposal.

6.6.3 Contributions from eligible partners

List all contributions from eligible partners. Do not include the amount requested from the CFI. Provide the partner name and type, as well as a breakdown of contributions (cash and in-kind) for each eligible partner. The applicant is encouraged to bundle all expected in-kind contributions from vendors into a single line. If partner contributions are expected but have not yet been confirmed, outline the plans for securing these funds.

6.6.4 Infrastructure utilization

This section of the Finance module captures the use of the requested infrastructure for CFI-eligible and non-eligible purposes and any applicable pro-rating of costs.

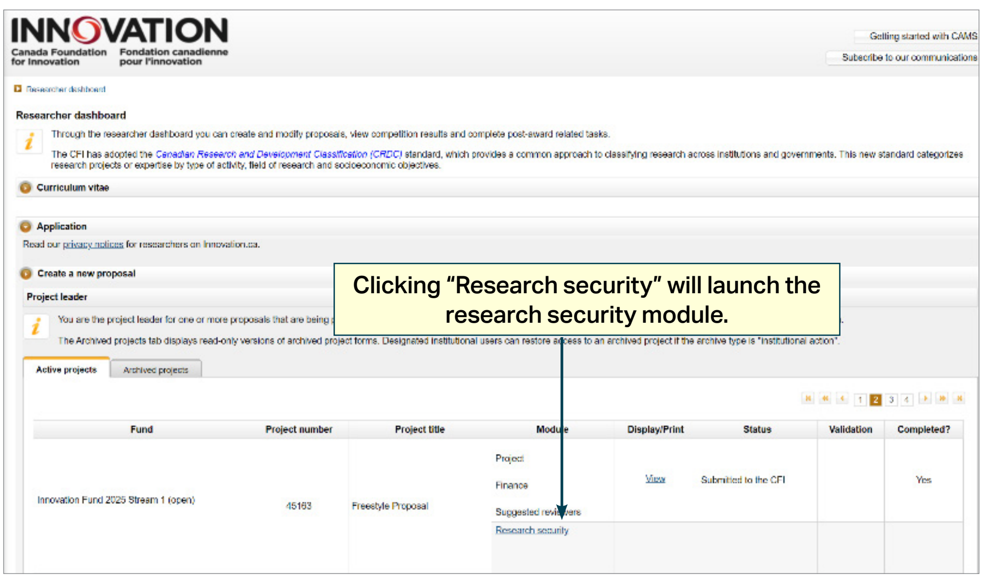
6.7 Suggested reviewers module

The list of suggested reviewers is prepopulated using the list if one was provided in a notice of intent. You may identify additional reviewers who are well-qualified to review the proposal. Refer to Section 6.3.5 of this document for conflict of interest guidelines. The decision whether or not to contact the suggested reviewers remains with the CFI.

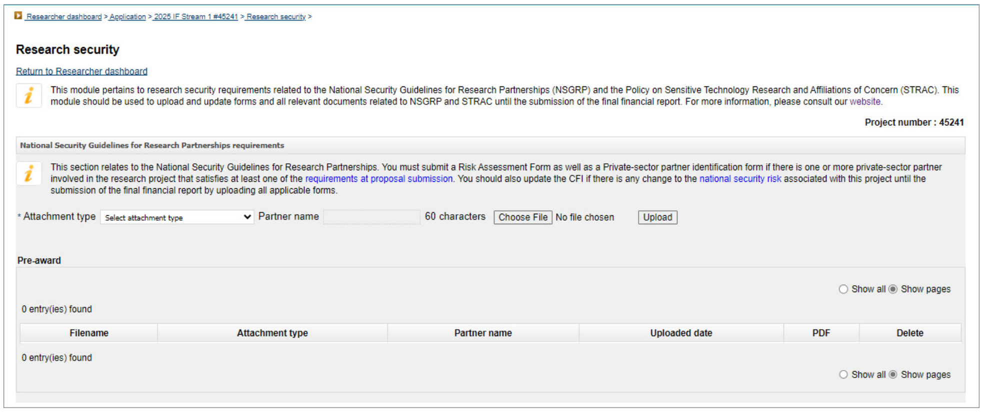
6.8 Research security module

The research security module will be visible if the answer to any of the research security questions in the “Project information” section of the notice of intent is “yes.” For information on the research security requirements, please consult our website.

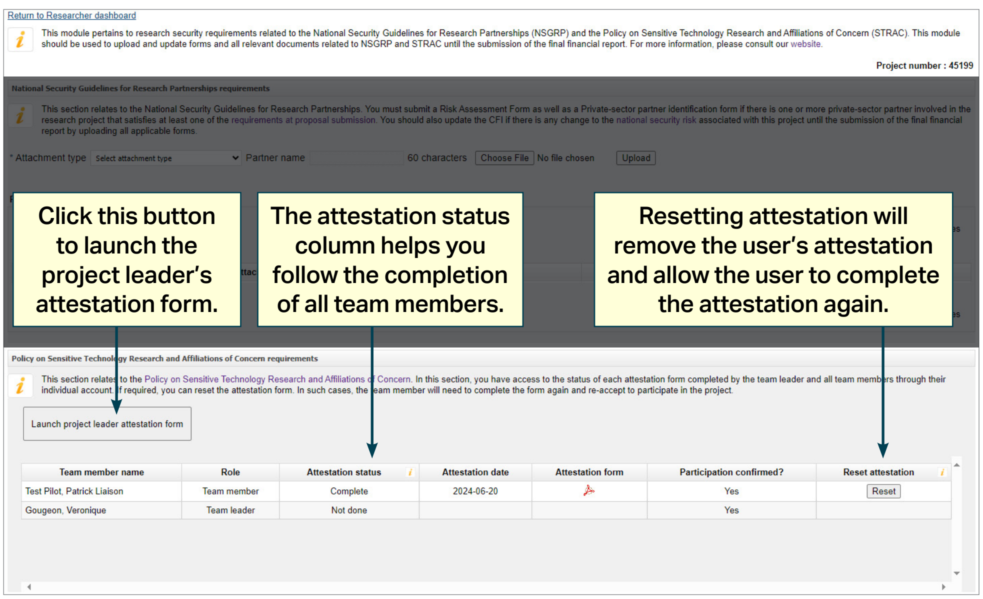
From the researcher dashboard, you can access the research security module by clicking the link below.



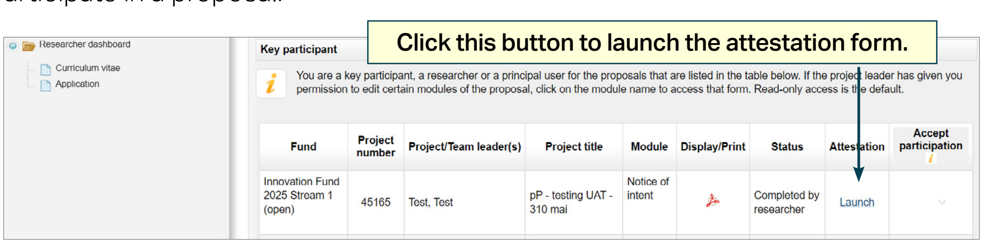
If the answer to the first research security question in the project information section is “yes,” meaning that the project involves at least one private-sector partner that meets the described criteria, you must upload a Risk Assessment Form (RAF) and one or more private-sector partner identification forms using the top portion of the research security module.



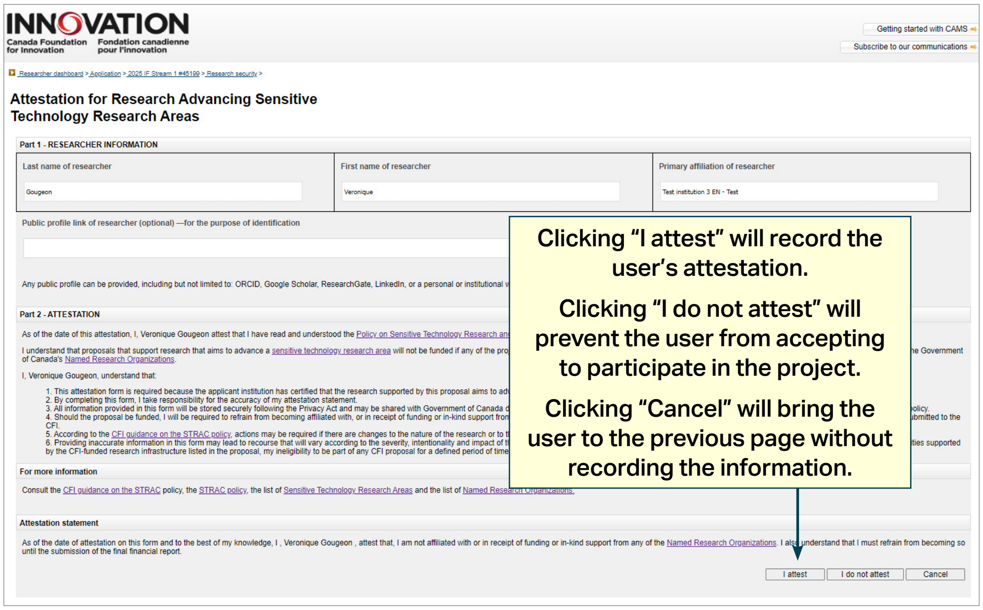
If the answer to the second research security question in the project information section is “yes,” meaning that the project aims to advance a sensitive technology research area, the project/team leader must use the bottom portion of the research security module to complete the CFI STRAC attestation form. This portion of the module also allows you to monitor whether other team members have completed the forms.



Other team members will get access to the CFI STRAC attestation form in the same screen where they accept to participate in a proposal.



Launching the attestation form allows the user to complete the form.



When the project aims to advance a sensitive technology research area, team members may have already completed the necessary attestation forms at the notice of intent stage. However, if the answer to the security question about the STRAC policy (in the project information section) was changed from "no" to "yes" after the notice of intent was submitted, all team members (including the project/team leaders) will need to complete the attestation form and accept again to participate in the project before you can submit the proposal.

6.9 Proposal sharing

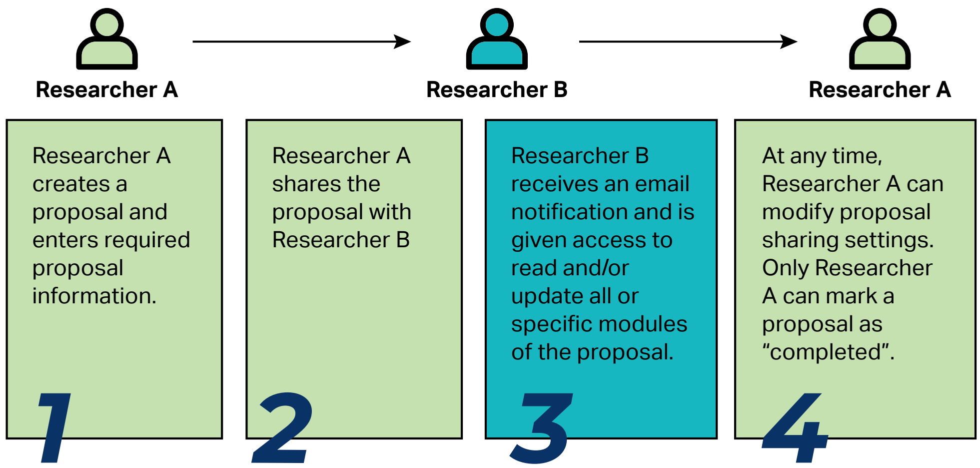
Proposal sharing is a feature which allows two or more users to contribute to a proposal. A proposal can be shared with anyone who has a CAMS account.

You may wish to share a proposal in order to:

- Allow one or more colleagues to contribute to the writing and preparation of a proposal or to specific modules of a proposal; or,
- Allow one or more colleagues to view a proposal or specific modules of a proposal.

6.9.1 Overview of proposal sharing

Researchers listed as principal users or candidates automatically gain read access to the entire proposal. However, if you would like one or more of the principal users identified on a proposal to complete or edit any part of your proposal, you must share the proposal with them to allow them to access and update it.



6.9.2 How to share your proposal

Step 1: Create a proposal

In the researcher dashboard click "Create a new proposal" and follow the steps.

Step 2: Enter the required proposal information

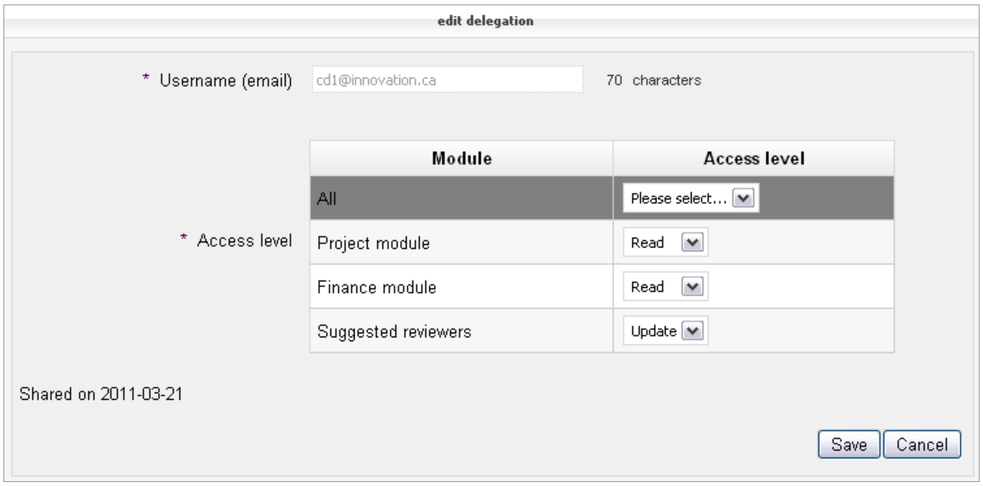
Enter the required proposal information and other related information. You can complete the entire proposal yourself, or collaborate with one or more colleagues to complete it.

Step 3: Go to the proposal sharing screen

Click "Proposal sharing" on the left-hand navigation bar and on the proposal sharing screen, click "Share this proposal with another person." Note that the proposal sharing screen is only accessible from within an application form. To reach the proposal sharing screen from your researcher dashboard, click on any module of the proposal you wish to share.

Step 4: Invite a colleague to read or update your proposal

Enter your colleague's username (email address) and select the level of access (read, update or none) you would like him or her to have for various proposal modules. In the example below, the project leader has given read access to the project and finance modules, and update access to the suggested reviewers section. You can also add comments that will be sent to your colleague. When you have completed this section, click "Save."



Your colleague will receive an email notification that they have been invited to view (read) or edit (update) your proposal.

6.9.3 Updating or removing proposal sharing

At any time, you can update or remove proposal sharing by selecting "Modify access level" on the proposal sharing page.

6.10 CV sharing

CV sharing is a feature of CAMS similar to proposal sharing. It allows you to give a colleague read or update access to your CV.

Step 1: Open your CV

On your researcher dashboard, click "Curriculum vitae" (left-hand navigation bar) and open your CV from within the "My CV" table.

Step 2: Invite your colleague to view or update your CV

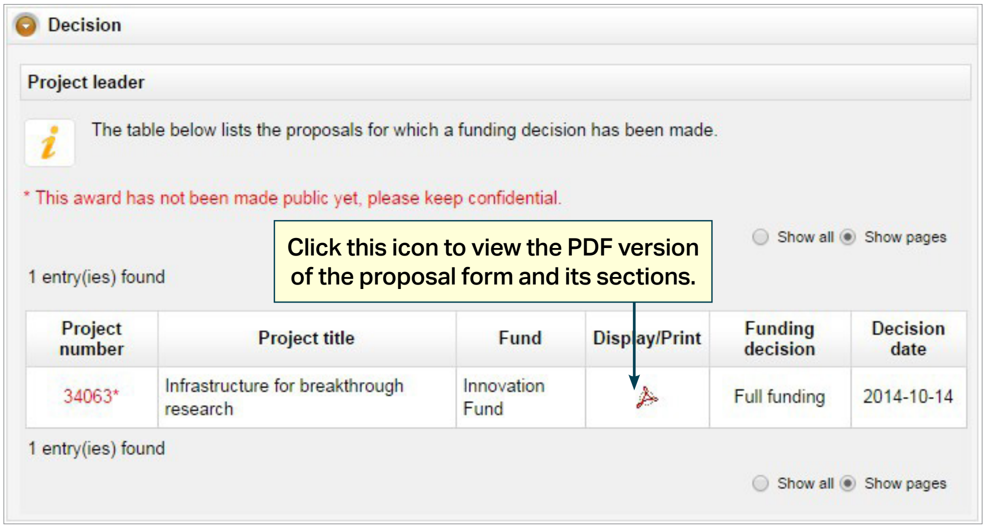
On the left-hand navigation bar, click "CV sharing" to access the CV sharing screen. Enter your colleague's username (email address) and click "Validate username."

Step 3: Send sharing invitation

Before you send the invitation to share your CV, specify the type of access — read or update — you wish your colleague to receive. You can also add comments that will be sent to your colleague. When you have completed this section, click "Save."

7 Decisions

CAMS allows you to view the funding decision related to the projects you lead. This section will only appear in your dashboard if you have proposals for which a funding decision has been made.


Decision

Project leader

The table below lists the proposals for which a funding decision has been made.

* This award has not been made public yet, please keep confidential.

Click this icon to view the PDF version of the proposal form and its sections.

Show all Show pages

1 entry(ies) found

Project number	Project title	Fund	Display/Print	Funding decision	Decision date
34063*	Infrastructure for breakthrough research	Innovation Fund		Full funding	2014-10-14

1 entry(ies) found

Show all Show pages

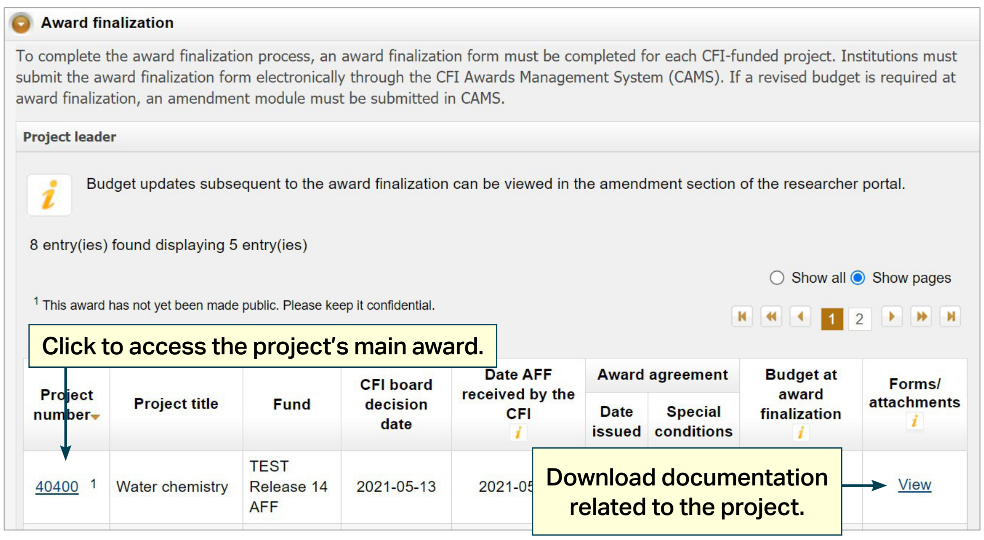
8 Award finalization

As a project leader, your institution may have given you access to the award finalization module. This module will only appear in your dashboard if you lead projects that have been funded by the CFI.

The award finalization section allows you to view award finalization status information related to the project(s), such as the date the award finalization form was received by the CFI, the date the award agreement was issued by the CFI (if applicable) and which budget was used at award finalization (itemized list[2], amendment or proposal). You will also be able to view special conditions included in the award agreement and whether these have been met or not.

You will be able to view the forms and attachments related to the project such as the award finalization form, the award agreement and the budget at award finalization (in both PDF and Excel format) by clicking on the "View" link. If applicable, you will also be able to view all revised award agreements issued for the project.

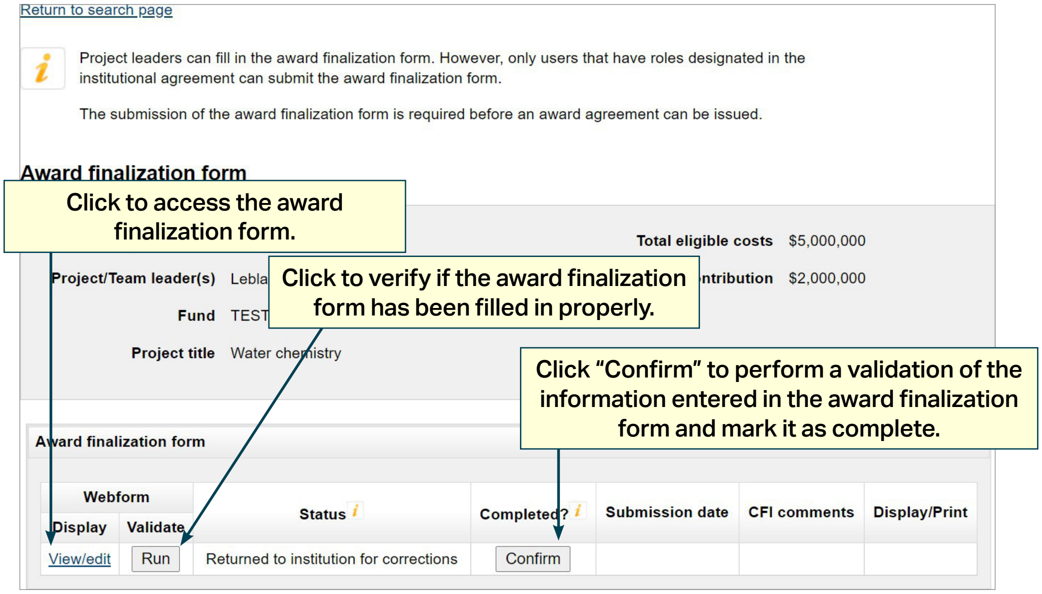
The award finalization module allows you to fill in award finalization forms. However, only individuals identified in the institutional agreement can submit an award finalization form in CAMS (i.e., president, director general, authorized signatories, liaison and account administrator).



2 The use of the itemized list form has been discontinued by the CFI in December 2014.

8.1 Project's main award finalization page

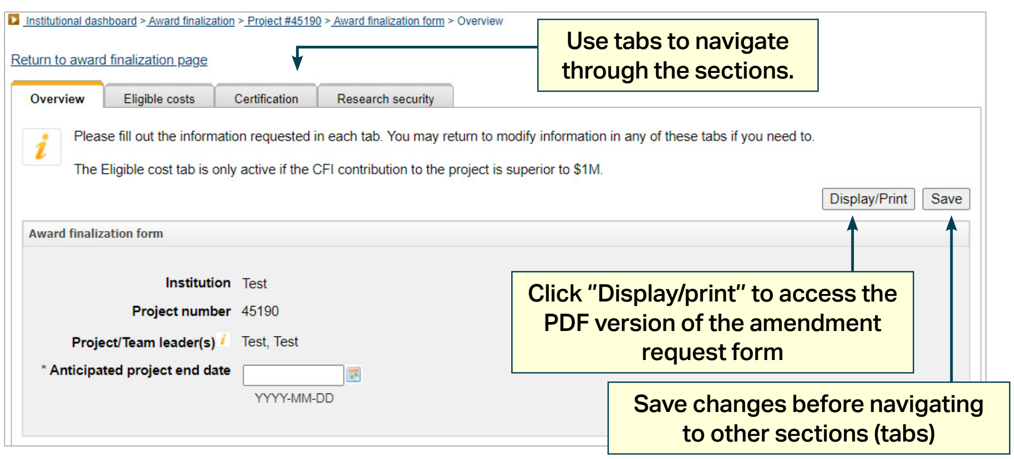
Each project has a main award finalization page where you can view the status of the award finalization form, access it for modification or mark it as complete.



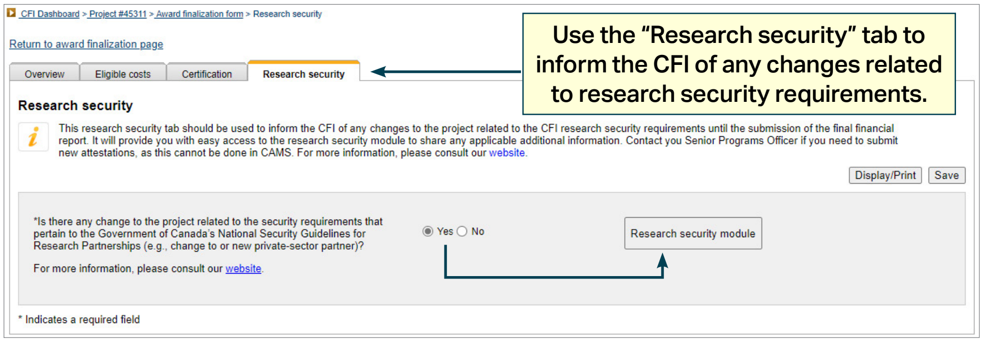
8.2 Award finalization form

The award finalization form consists of four tabs. When an award finalization form is first opened, the "Overview" tab is selected by default. You will always have access to the "Certification" and "Research security" tabs, but the "Eligible costs" tab will only be available for projects requesting more than $1 million from the CFI.

Once you have marked the award finalization form as completed, your institution will have the opportunity to make changes and then submit it to the CFI.



You can use the “Research security” tab to inform the CFI of any changes to the project related to the research security requirements that pertain to the Government of Canada’s National Security Guidelines for Research Partnerships. Answering “yes” to the question will give you access to the research security module where you should upload relevant documents (updated Risk Assessment Form and private-sector partner identification form(s)).

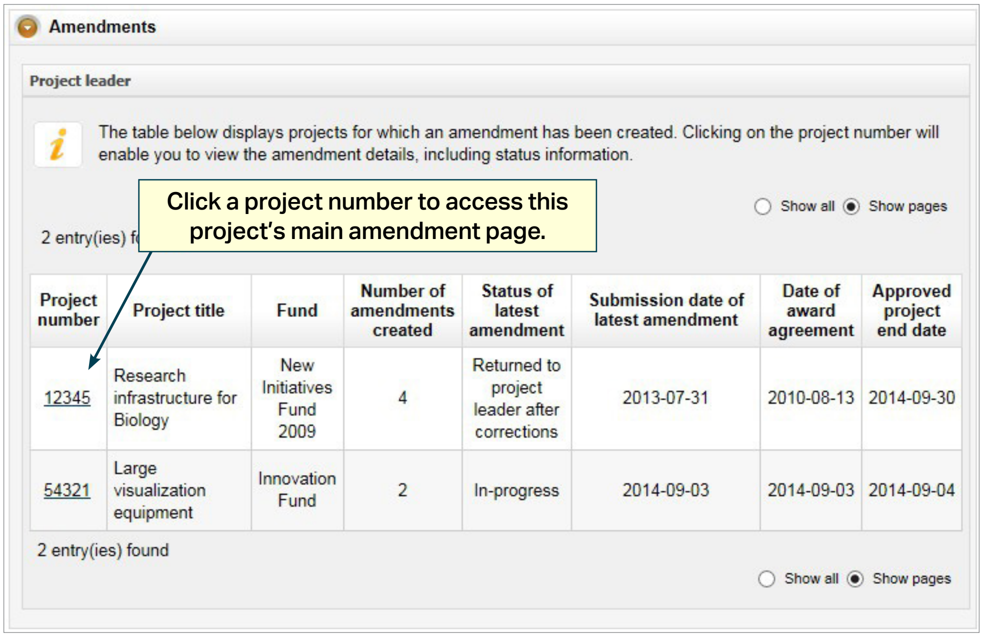


If your project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member is required to immediately submit an attestation form. Contact your CFI liaison in your research office for detailed instructions on how to submit those forms.

9 Amendments

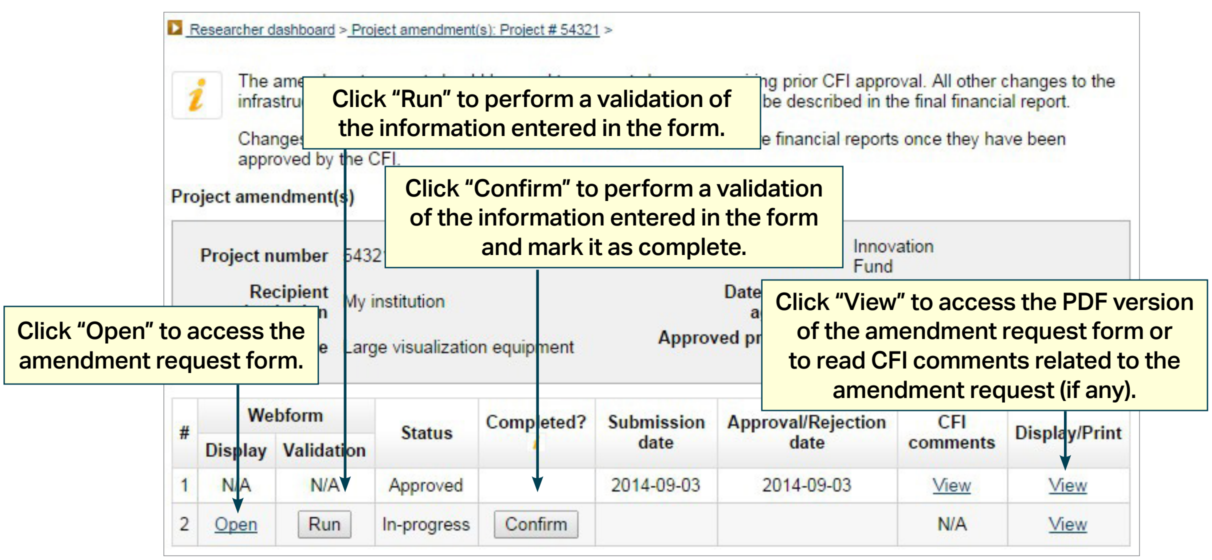
As a project leader, your institution may have given you access to the amendment module. This module will only appear in your dashboard if you lead projects for which an amendment request has been created.

The amendment module allows you to view amendment status information related to the project(s), such as the number of amendment requests created and the status of the latest amendment requests created. It also allows you to input data in the amendment form.



9.1 Project's main amendment page

Each project has a main amendment page where you can view the status of previous amendment requests submitted to the CFI for the project (if any), and input data in amendment requests created by your institution.

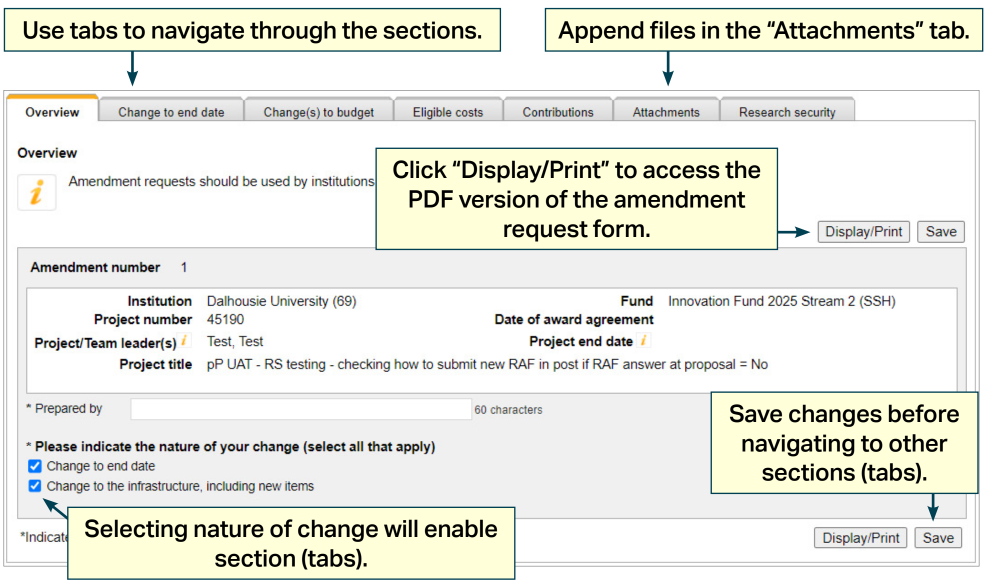


Note that only amendment requests relating to changes to the infrastructure will include an Excel version of the amendment request, in addition to the PDF version. If the amendment request pertained only to a change in the project end date, only the PDF version of the amendment request will be available.

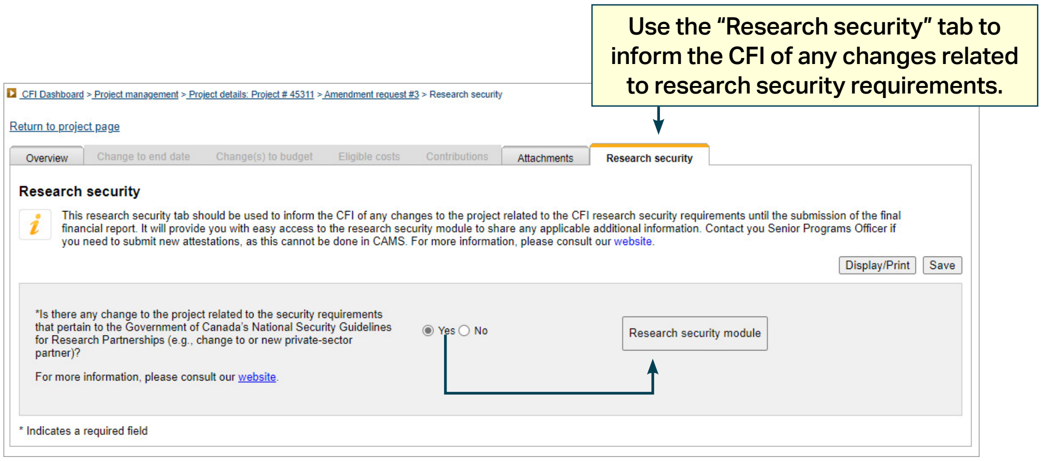
Once you have marked an amendment request as completed, your institution will verify it and submit it to the CFI if no changes are required. If changes are required, your institution may make corrections itself, but can also return the amendment request to you in order to allow you to make the appropriate corrections.

9.2 Amendment request form

The amendment request form consists of seven tabs. When an amendment request is first opened, the default tab is the "Overview" and the other tabs are not accessible. You will first need to indicate the nature of your change (i.e., change to the end date of the project or change to the infrastructure, including new items, or both). This will determine which tabs will become available and need to be filled out. The "Attachments" tab allows you to attach up to three documents (PDF format) to further explain changes made to the project.



You can use the "Research security" tab to inform the CFI of any changes to the project related to the research security requirements that pertain to the Government of Canada's National Security Guidelines for Research Partnerships. Answering "yes" to the question will give you access to the research security module where you should upload relevant documents (updated Risk Assessment Form and private-sector partner identification form(s)).

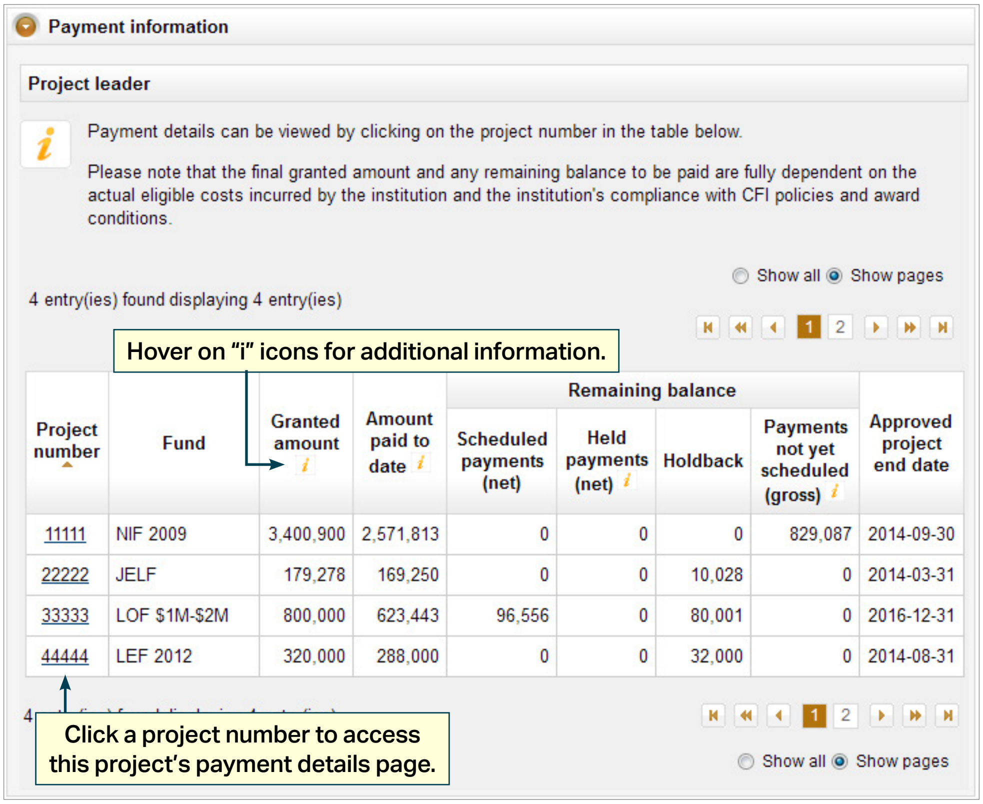


If your project was not aiming to advance a sensitive technology research area when you submitted the proposal, remain aware of any change in the nature of the project that would mean it now does. In such an instance, each project/team leader and team member are required to immediately submit an attestation form. Contact your CFI liaison in your research office for detailed instructions on how to submit those forms.

10 Payment

As a project leader, your institution may have given you access to the payment module. This module will only appear in your dashboard if you lead projects that have been funded by the CFI and for which an award agreement has been issued.

The payment module allows you to view payment information related to the project(s), such as amounts paid to date and remaining balance to be paid by the CFI.



Payment information

Project leader

Payment details can be viewed by clicking on the project number in the table below.

Please note that the final granted amount and any remaining balance to be paid are fully dependent on the actual eligible costs incurred by the institution and the institution's compliance with CFI policies and award conditions.

Show all Show pages

4 entry(ies) found displaying 4 entry(ies)

1 2

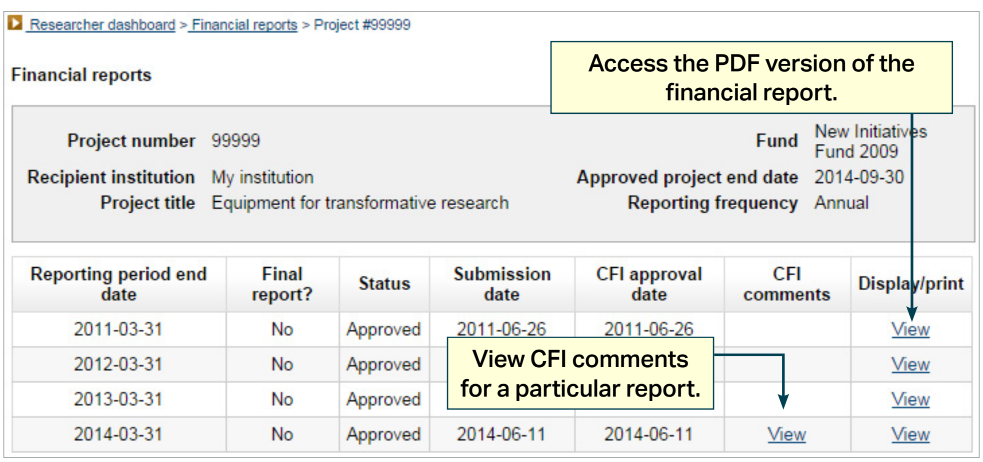
Hover on "i" icons for additional information.

Project number	Fund	Granted amount	Amount paid to date	Remaining balance				Approved project end date
				Scheduled payments (net)	Held payments (net)	Holdback	Payments not yet scheduled (gross)	
11111	NIF 2009	3,400,900	2,571,813	0	0	0	829,087	2014-09-30
22222	JELF	179,278	169,250	0	0	10,028	0	2014-03-31
33333	LOF $1M-$2M	800,000	623,443	96,556	0	80,001	0	2016-12-31
44444	LEF 2012	320,000	288,000	0	0	32,000	0	2014-08-31

Click a project number to access this project's payment details page.

1 2

Show all Show pages



Researcher dashboard > Financial reports > Project #99999

Financial reports

Access the PDF version of the financial report.

Project number	99999	Fund	New Initiatives Fund 2009
Recipient institution	My institution	Approved project end date	2014-09-30
Project title	Equipment for transformative research	Reporting frequency	Annual

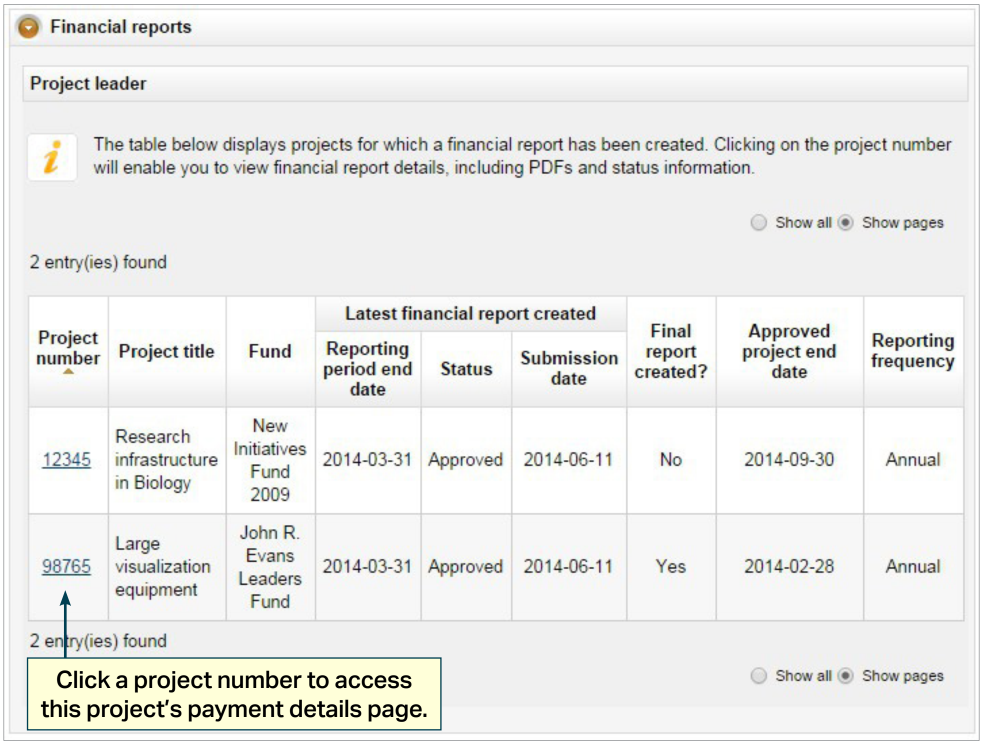
Reporting period end date	Final report?	Status	Submission date	CFI approval date	CFI comments	Display/print
2011-03-31	No	Approved	2011-06-26	2011-06-26		View
2012-03-31	No	Approved				View
2013-03-31	No	Approved				View
2014-03-31	No	Approved	2014-06-11	2014-06-11	View	View

View CFI comments for a particular report.

11 Financial reports

As a project leader, your institution may have given you access to the financial report module. This module will only appear in your dashboard if you lead projects for which a financial report has been created.

The financial report module allows you to view financial report status information related to the project(s).


Financial reports

Project leader

The table below displays projects for which a financial report has been created. Clicking on the project number will enable you to view financial report details, including PDFs and status information.

Show all Show pages

2 entry(ies) found

Project number	Project title	Fund	Latest financial report created			Final report created?	Approved project end date	Reporting frequency
			Reporting period end date	Status	Submission date			
12345	Research infrastructure in Biology	New Initiatives Fund 2009	2014-03-31	Approved	2014-06-11	No	2014-09-30	Annual
98765	Large visualization equipment	John R. Evans Leaders Fund	2014-03-31	Approved	2014-06-11	Yes	2014-02-28	Annual

2 entry(ies) found

Show all Show pages

11.1 Project's main financial report page

Each project has a main financial report page where you can view the status of previous financial reports submitted to the CFI for the project (if any). You can also view CFI comments related to the financial report for a specific reporting year (if any) and have access to the PDF version of all the financial reports.

12 Project progress report

As a project leader, you have access to the Project progress report (PPR) module which allows you to view and manage the infrastructure operational status as well as fill out and complete the PPR form.

This section provides additional information on the PPR module within CAMS. See the [Policy and program guide] for information on requirements and guidelines related to completing the PPR.

The process to submit a PPR to the CFI typically involves three steps:

1. You, as a project leader, indicate infrastructure operational status online (if applicable). Institutional administrators with appropriate access can also indicate operational status online on your behalf.
2. You fill out, validate, and complete the PPR.
3. The institution may edit the PPR and/or return it to you for revision. An authorized institutional administrator submits the PPR to the CFI.

Although completion of the PPR is under your responsibility, a delegation tool allows you to share access to the online form with another individual with a CAMS account to support data entry.

The graphic below depicts the overview of CAMS PPR modules and associated tasks for you as a project leader.s

Researcher dashboard

Project progress reports: Summary list

- View all projects for which the project leader is required to complete PPRs in current or future years
- Select each project number to manage operational statuses and PPRs

↓

Project progress report details

- View the historical and current infrastructure operational statuses and PPR(s) of selected project
- Change the infrastructure operational status (if applicable) *
- Select project to go to PPR form (if reporting schedule has been started)
- Display or print out PPR content
- Validate PPR content *
- Confirm PPR is completed *

↕

Project progress report form

- Go to each section of PPR to fill out form and validate content of PPR *
- Give access to another individual to enter PPR data (only when institution activates this function) *

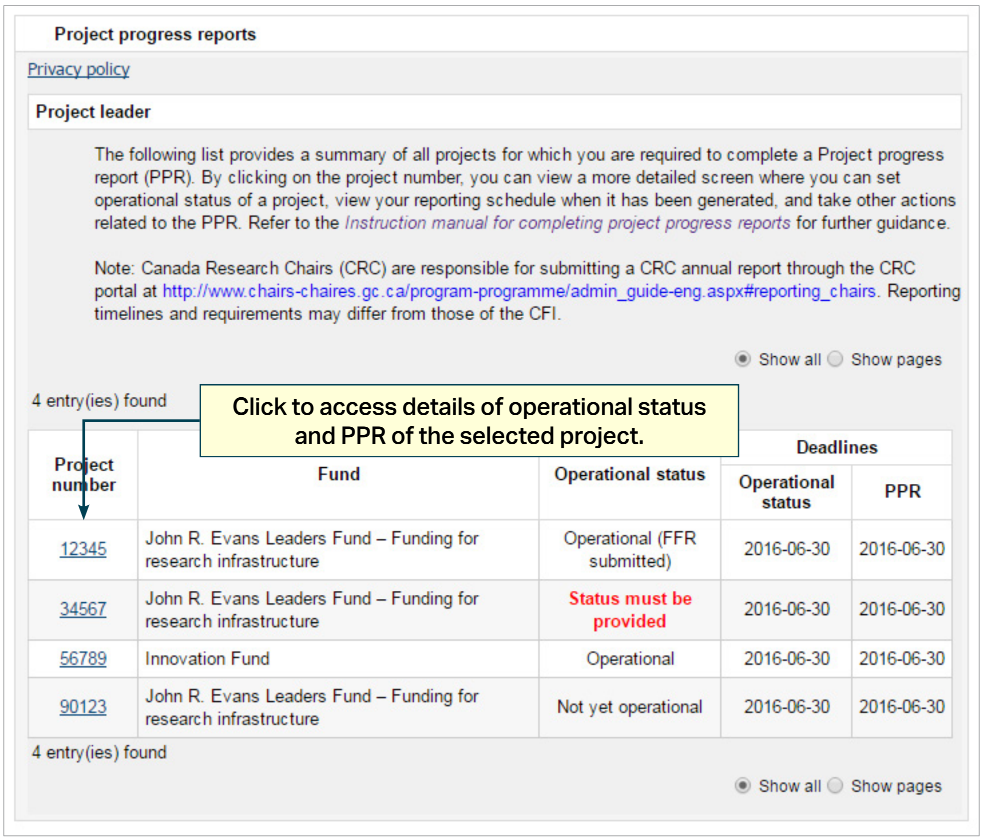
* Indicates tasks for which project leader has primary responsibility. Institutional administrators with appropriate access can also complete these tasks on behalf of project leaders.

12.1 Summary of operational and project progress report statuses

The summary table indicates all of the projects for which you are required to take actions related to infrastructure operational statuses and PPRs in current or upcoming years. From this list, you will be able to drill down to the page in the selected project to manage operational status and the PPR. Institutional administrators with appropriate access can also complete these actions on your behalf.

Four different statuses can be displayed under the “Infrastructure operational status” column:

- **Status must be provided:** Infrastructure operational status needs to be reported.
- **Operational (FFR submitted):** PPR will be required in the next reporting period following final financial report (FFR) being submitted.
- **Operational:** PPR is due in the current reporting period.
- **Not yet operational:** PPR is not required this year unless the status is changed to operational. You may change the status to operational any time before the institutional deadline indicated.


Project progress reports

Privacy policy

Project leader

The following list provides a summary of all projects for which you are required to complete a Project progress report (PPR). By clicking on the project number, you can view a more detailed screen where you can set operational status of a project, view your reporting schedule when it has been generated, and take other actions related to the PPR. Refer to the *Instruction manual for completing project progress reports* for further guidance.

Note: Canada Research Chairs (CRC) are responsible for submitting a CRC annual report through the CRC portal at http://www.chairs-chaires.gc.ca/program-programme/admin_guide-eng.aspx#reporting_chairs. Reporting timelines and requirements may differ from those of the CFI.

Show all Show pages

4 entry(ies) found

Click to access details of operational status and PPR of the selected project.

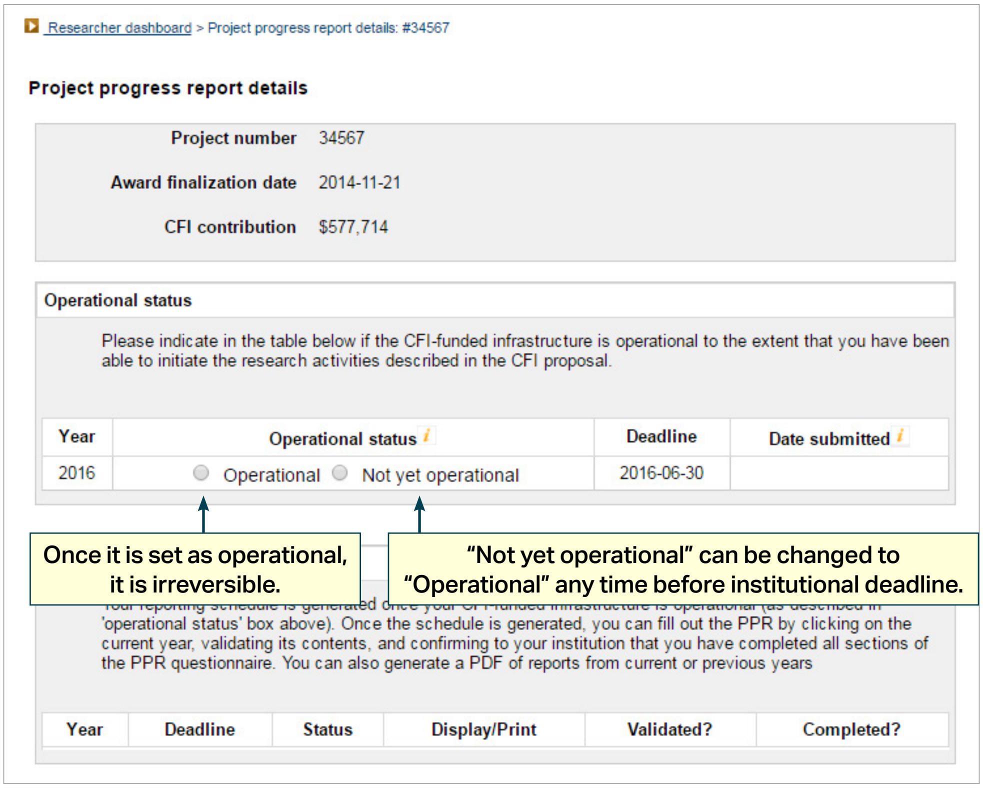
Project number	Fund	Operational status	Deadlines	
			Operational status	PPR
12345	John R. Evans Leaders Fund – Funding for research infrastructure	Operational (FFR submitted)	2016-06-30	2016-06-30
34567	John R. Evans Leaders Fund – Funding for research infrastructure	Status must be provided	2016-06-30	2016-06-30
56789	Innovation Fund	Operational	2016-06-30	2016-06-30
90123	John R. Evans Leaders Fund – Funding for research infrastructure	Not yet operational	2016-06-30	2016-06-30

4 entry(ies) found

Show all Show pages

12.2 Managing required operational statuses

When the operational status column indicates “Status must be provided,” you will be required to select the latest infrastructure operational status. This will trigger the PPR reporting schedule as specified in section 12.1.



Researcher dashboard > Project progress report details: #34567

Project progress report details

Project number	34567
Award finalization date	2014-11-21
CFI contribution	$577,714

Operational status

Please indicate in the table below if the CFI-funded infrastructure is operational to the extent that you have been able to initiate the research activities described in the CFI proposal.

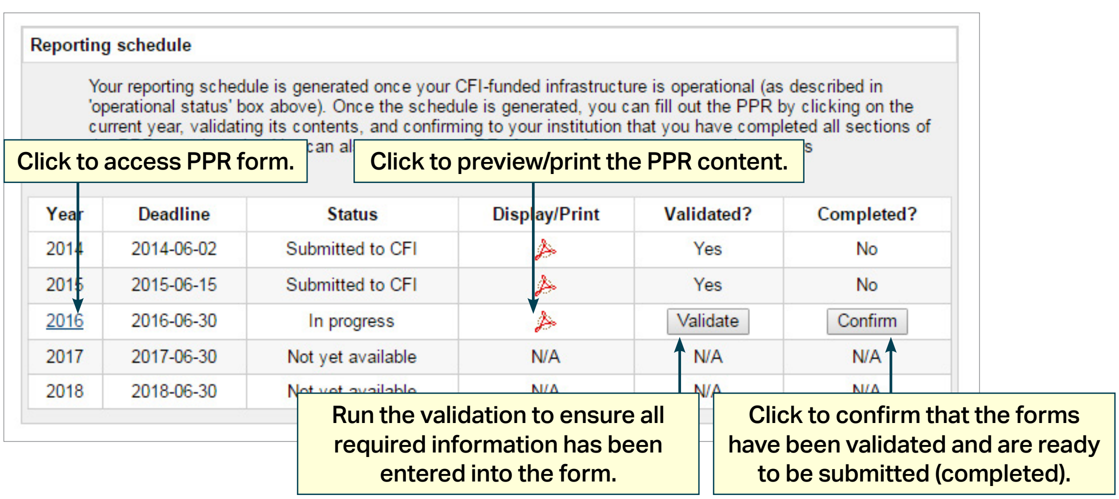
Year	Operational status	Deadline	Date submitted
2016	Operational / Not yet operational	2016-06-30	

'operational status' box above). Once the schedule is generated, you can fill out the PPR by clicking on the current year, validating its contents, and confirming to your institution that you have completed all sections of the PPR questionnaire. You can also generate a PDF of reports from current or previous years

Year	Deadline	Status	Display/Print	Validated?	Completed?

12.3 Filling out, validating and completing a project progress report

Once the PPR reporting schedule has been triggered, the statuses of all newly created PPRs in CAMS are shown as “in progress.” Clicking on the project number will take you to the PPR form. As a project leader, you have full access to the PPR form to enter, validate data and complete the PPR. Institutional administrators with appropriate access can also enter, validate and complete the forms on your behalf.



Reporting schedule

Your reporting schedule is generated once your CFI-funded infrastructure is operational (as described in 'operational status' box above). Once the schedule is generated, you can fill out the PPR by clicking on the current year, validating its contents, and confirming to your institution that you have completed all sections of

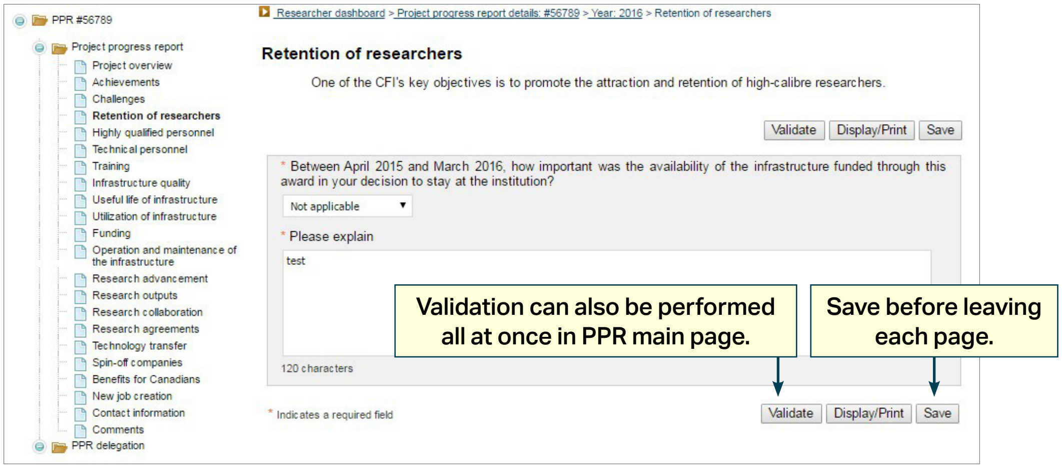
Year	Deadline	Status	Display/Print	Validated?	Completed?
2014	2014-06-02	Submitted to CFI		Yes	No
2015	2015-06-15	Submitted to CFI		Yes	No
2016	2016-06-30	In progress		Validate	Confirm
2017	2017-06-30	Not yet available	N/A	N/A	N/A
2018	2018-06-30	Not yet available	N/A	N/A	N/A

Once the form has been completed, you will no longer be able to modify the PPR. The institution retains access to edit the forms and can return the PPR to you for corrections as needed. Once the institution ensures that the PPR is completed and ready for submission, an authorized institutional administrator may submit the PPR to the CFI.

Once the PPR has been submitted to the CFI, the institution will no longer be able to edit the forms.

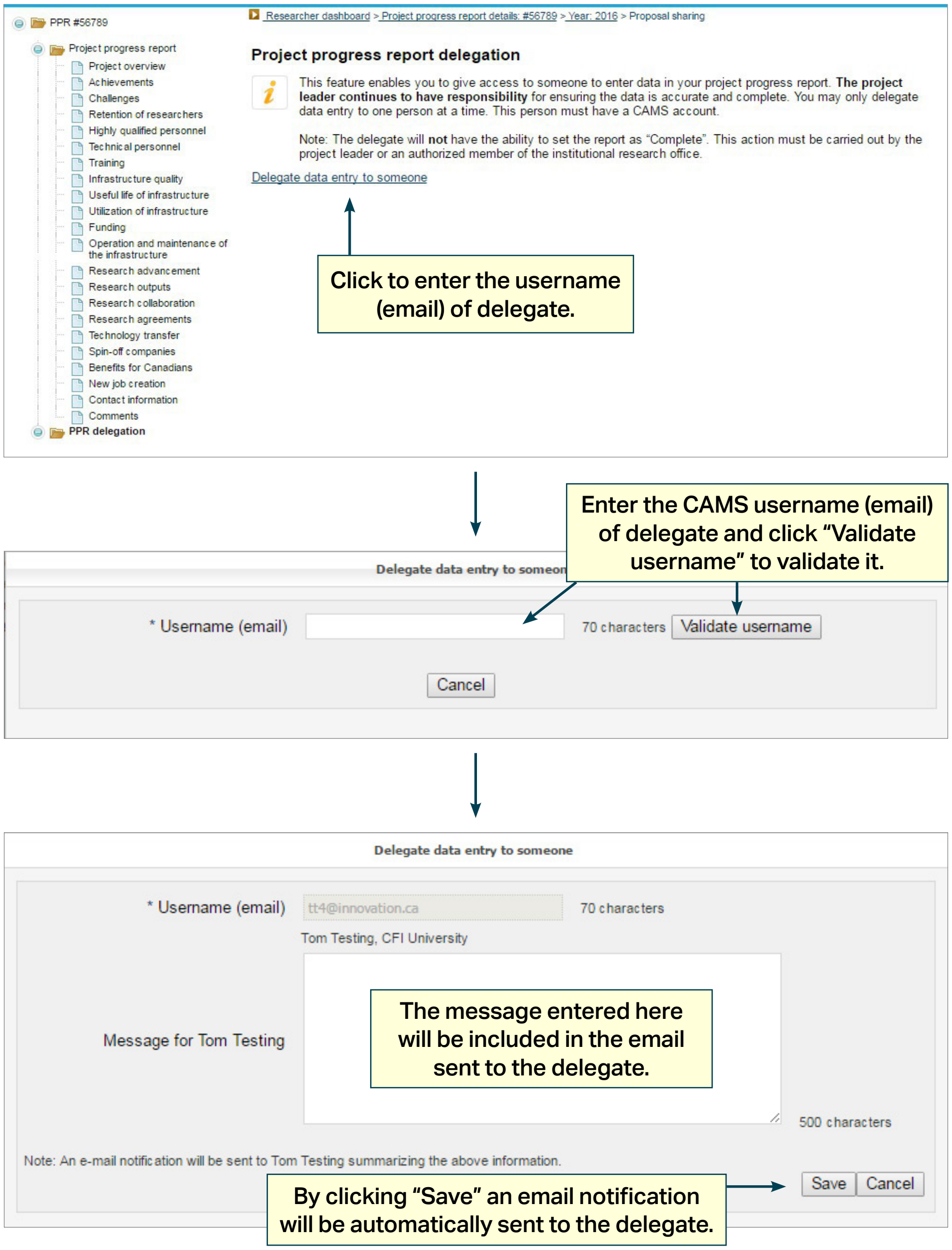
12.4 Navigating within the project progress report form

To navigate between Project progress report sections, use the left-hand side menu. For additional reference, you can find a page-by-page view of each screen of the PPR in the [PPR template document].



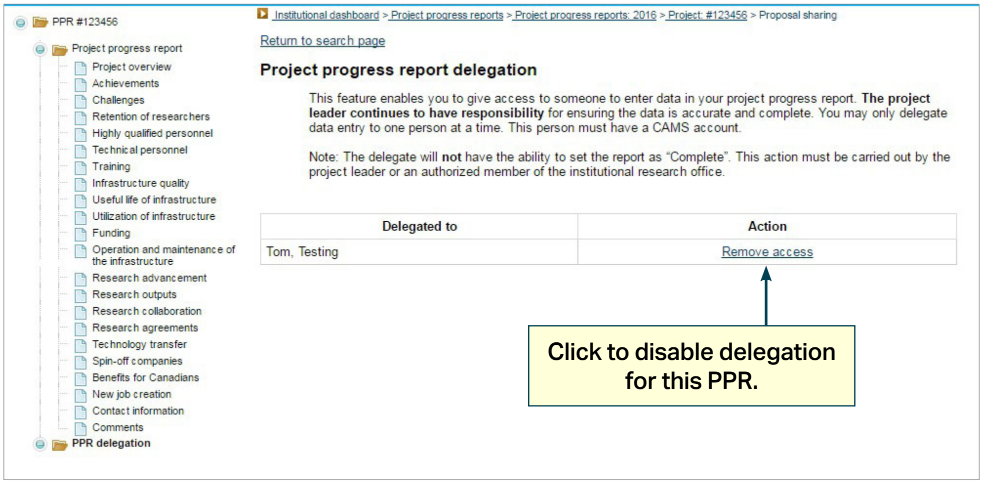
12.5 Delegate filling out the project progress report to another individual

This feature enables you to give access to someone to enter data in your project progress report. Institutional administrators with appropriate access can also delegate entry on your behalf.



Note: You and your institution will still be responsible for the PPR "complete" and "submit" functions through your CAMS dashboards, and for ensuring the completeness and accuracy of the data entered in your PPRs. The delegate will **not** have the ability to set the PPR as "complete."

In order to deactivate delegate function, click “Remove access.”



For any questions about CAMS,
feel free to contact us at:

help@innovation.ca

We will be happy to answer you promptly.