



Heart & Stroke

CIRCULink

2019/20

APPLICANT USER GUIDE

How to submit a Grant-in-Aid application online

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## 1. Introduction

CIRCULink is Heart & Stroke's online research programs portal. To apply for a Grant-in-Aid (GIA), applicants apply online.

Aspects of Heart & Stroke's peer review, budget review, and grant administration processes are done online for the GIA program.

## 2. Before you begin using CIRCULink

Here are a few tips to help orient you to the system before you actually begin preparing a grant application.

### Browsers:

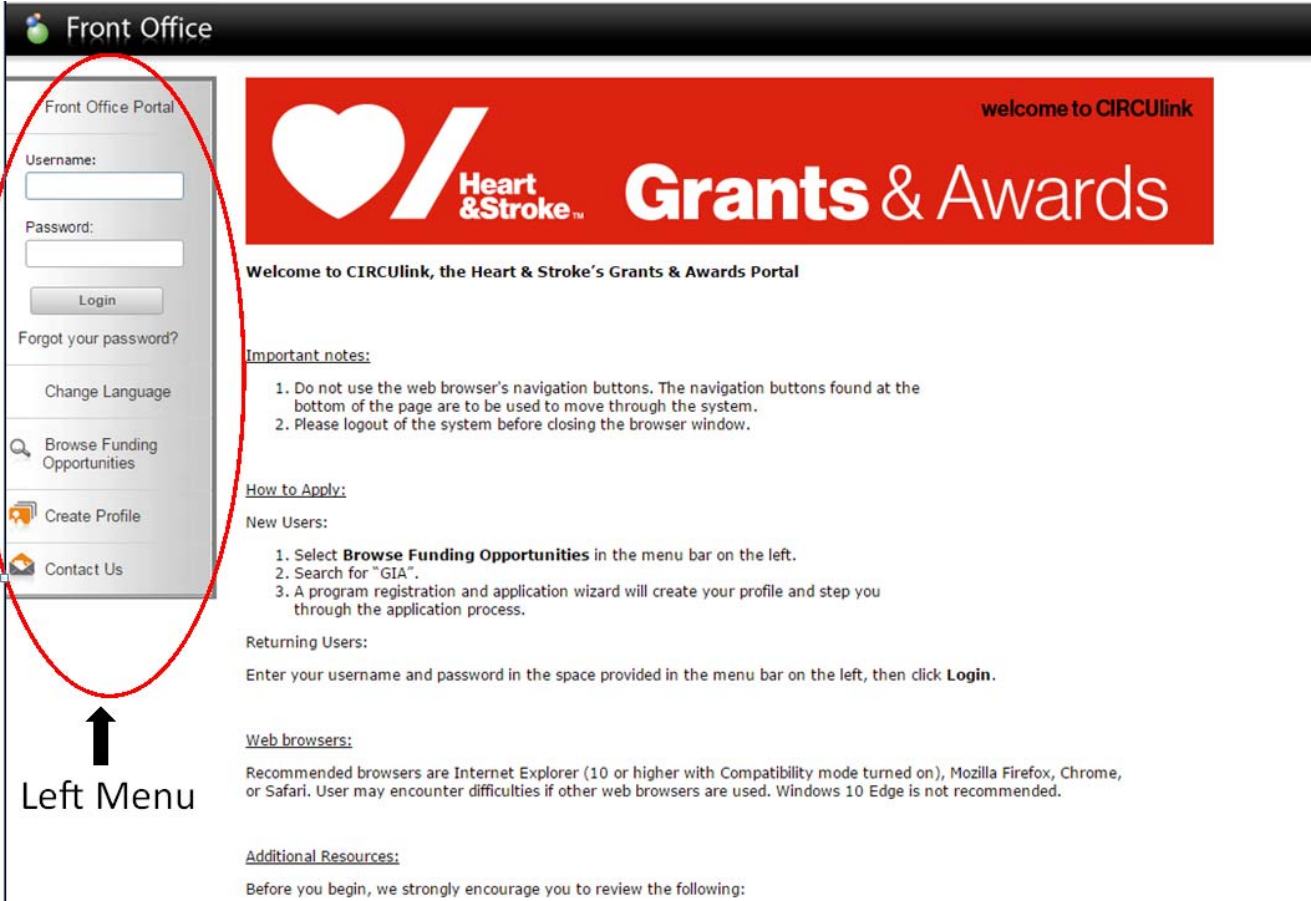
Recommended web browsers are Internet Explorer (version 10 or higher with Compatibility mode turned on), Mozilla Firefox, Chrome, or Safari. Users may encounter difficulties if other web browsers are used. Windows 10 Edge is **not** recommended.

### Navigation

While in CIRCULink, **please do not use any other web browser buttons** – e.g. forward, back, refresh, etc. Instead, use the navigation features within CIRCULink. There are two available to you:

**Left Menu** - This is where you login to access CIRCULink. Look for the "**bold**" item on the left menu to let you know where you are in the application process. Depending on where you are in the system, you will see a changing list of options in the left menu of the CIRCULink screen.

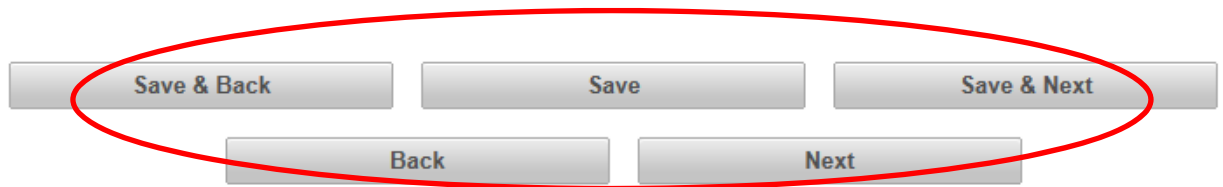
### The Welcome Page



The screenshot displays the CIRCULink Front Office Portal. On the left, a vertical menu is circled in red and labeled "Left Menu" with an upward-pointing arrow. The menu items include "Front Office Portal", "Username:" (with a text input field), "Password:" (with a text input field), "Login" (button), "Forgot your password?", "Change Language", "Browse Funding Opportunities" (with a magnifying glass icon), "Create Profile" (with a person icon), and "Contact Us" (with an envelope icon). The main content area features a red banner with the Heart & Stroke logo and the text "welcome to CIRCULink" and "Grants & Awards". Below the banner, the text reads "Welcome to CIRCULink, the Heart & Stroke's Grants & Awards Portal". The "Important notes" section contains two points: "1. Do not use the web browser's navigation buttons. The navigation buttons found at the bottom of the page are to be used to move through the system." and "2. Please logout of the system before closing the browser window." The "How to Apply:" section includes "New Users:" with three steps: "1. Select **Browse Funding Opportunities** in the menu bar on the left.", "2. Search for 'GIA'.", and "3. A program registration and application wizard will create your profile and step you through the application process." The "Returning Users:" section instructs users to "Enter your username and password in the space provided in the menu bar on the left, then click **Login**." The "Web browsers:" section lists recommended browsers: "Internet Explorer (10 or higher with Compatibility mode turned on), Mozilla Firefox, Chrome, or Safari. User may encounter difficulties if other web browsers are used. Windows 10 Edge is not recommended." The "Additional Resources:" section states, "Before you begin, we strongly encourage you to review the following:"

## On-Screen Buttons

At the bottom of the various screens in CIRCULINK you will see several options, for example, "Save", "Save & Back", "Save & Next".



You can also move *Back* to a previous page and advance to the *Next* without saving, but you will lose any unsaved work by doing so.

The "Save" and "Save & Next" buttons also activate certain features within CIRCULink, for example:

- **Warnings** if some mandatory fields have not been completed on a screen (some fields auto-save upon entry)
- **Calculations** in the budget section

**It is highly recommended that you "Save" your work frequently. As a security feature, CIRCULINK is programmed to 'time-out' every 45 minutes. Simply clicking "OK" on the time-out warning button will not stop the countdown. Click on a field within your application, or move around in the left menu to stay logged in for the next 45 minute cycle.**

## Mandatory Fields

Mandatory fields in CIRCULink are marked with "\*". If you have not responded to a mandatory question, two things may happen:

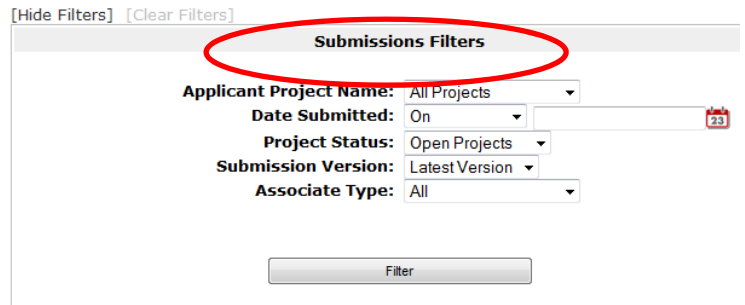
- 1) You will be notified before moving on to the next page that required information is missing;
- 2) You will **not be able to "submit"** when you get to the end of the application. The final "Submit" button at the end of the application will remain gray. If you see "Please Complete" against an item, you need to enter more information in that part of the application. You can hyperlink back to the part in question by clicking on the section name. Watch for **onscreen notes in red** as you go. They indicate that required information is missing.

## Conditionally Visible Fields

These are fields that remain invisible until you enter information into a specific field. A new, related field will then become visible and require data entry (immediately, or upon 'saving'). For example, if you indicate that you are applying to another organization with this application, a new field will become visible asking you *which* other organization.

## Filters – They reduce screen clutter

On some screens, you have the option of changing what you see onscreen by applying 'filters' (top of the screen). Sometimes filters are helpful, other times critical. For example, if a selection you are looking for is not appearing onscreen, it may be that a filter needs adjusting to make it visible.



[Hide Filters] [Clear Filters]

**Submissions Filters**

Applicant Project Name: All Projects

Date Submitted: On

Project Status: Open Projects

Submission Version: Latest Version

Associate Type: All

Filter

## Character Limits

Fields will have character limits appropriate to the question being asked. For example, you cannot enter more than 5,000 characters as part of your "Project Summary". If you exceed this amount, an error message will appear and you will have to edit your text down until it is accepted by the system.

## Drop Down Fields

Some drop down fields are defaulted to "select". You **must select an option** before you will be able to submit, e.g. "not applicable".

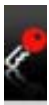


When you see this icon as you work on your application, it means there is some help text available. Click on the icon and the text will be displayed.

## Pop-ups

You will need to allow pop-ups while using CIRCULink.

## Logout



The **Logout** button is on the upper right corner of your screen. **Always logout before closing your web browser.**

## 3. Accessing CIRCULink

You can get to the system:

- 1) Via a URL found from the Heart & Stroke's research website, <http://hsf.ca/research/en/circulink>
- 2) If viewing this guide on your computer, click on the link below or by copying and pasting the link into your web browser: <https://circulink.hsf.ca/grantium/index.jsf>

When you arrive at the Welcome Page, select the language of your choice<sup>1</sup>, enter your username and password (once you have created a User Profile – see section 4) and click "login". You will be working in the "Front Office" of CIRCULink.

**Do not use any of your web browser buttons when using CIRCULink. If you do, the system may bounce you out.**

## 4. Creating Your User Profile

Do you already have a CIRCULink User Profile? This is your 'account' within the system. If you have not created one, you will need to before you can begin creating applications. You only need to do this once.

Click on "Create Profile" in the left menu and fill in the required fields. You can update your profile at any time by clicking on "My Account" in the left menu.

<sup>1</sup> Applicants submitting applications in French must use commas, not periods, when entering numerical information.

## 5. Creating Your Applicant Profile

Your Applicant Profile contains some basic information on you and your institution. You need to register an Applicant Profile before continuing. Once you have created it, it will be available to you for future funding applications.

### Using the Registration Wizard – Recommended


To begin creating your Applicant Profile, click on the “Browse Funding Opportunities” in the left menu and enter the name of the program you want to apply to (e.g. Grant-in-Aid, GIA). Or click “search” to view available opportunities.



Click on the “Register” icon. The **Registration Wizard** will launch and walk you through completing your Profile. (In the left menu, you will see that the steps that will need to be followed have appeared.) When you are done, you will be ready to begin creating your application.

Note: You will be asked to enter an “Applicant Project Name” while registering and, later, when completing the Application you will be asked to enter “Title of the Proposed Research”. This is a software-generated requirement. Enter the same title again.

If you need to update your Applicant Profile, when you log-in:



- Click “Applicants” in the left menu
- Click on the “View Applicants”  icon
- Click “Submit Applicant Profile” in left menu
- Click “Edit”
- Click on the “Applicant Information” or “Research Institution” hyperlink in the box above and make your changes
- Click “Save” and then “Submit Applicant Profile” in the left menu
- Click the “Complete” button

### Registering without using the Wizard – Not Recommended

We strongly encourage you to use the Wizard as it simplifies the registration process. However, in the event you are accidentally logged out before completing the process, or you complete your registration but want to come back later to start an application, follow the steps below.

#### When you log-out post-registration but before you start an application


When you return to CIRCULink:

- Log-in
- From the post log-in screen, click **Projects** in the left menu
- Select the funding opportunity you want from the drop down box at the top of the screen (e.g. GIA 2019/20)
- Click on the  icon in the upper left of screen
- Create a Project name for your proposal
- Click “Save & Back”
- Click Submissions in left menu
- Click on the  icon next to your project name

The application form will now be open for you to start editing.

#### Logging back in after you have started an application:

When you return to CIRCULink:

- Log-in
- Click “Submissions” in the left menu
- Click on the  icon next to the project you want to work on


See Section 10, Troubleshooting and Help, for more assistance.

## 6. The Application Form

Once your application is underway, the left menu will expand considerably, allowing you to jump to various parts of the application form. You do not have to complete the form in sequential order, or all at one time. However, we do suggest completing the form in a linear way as some questions in the latter part of the form – or on the active page - are linked to your responses earlier in the process (e.g. “The number of years of funding being requested” question, the response is linked to the budget section where the system will display the appropriate funding years).

Application forms in CIRCULink are composed of a series of web forms containing various parts of the application, for example, the budget sheet, project summary, co-applicant names, etc. After completing the fields on a screen, click “Save & Next” and move on to the next screen (or “jump” to another part of the application using the left menu... **but do not jump until you “Save”!**).

Budget Sheet – Go to this symbol to enter budget details:  You will not be able to enter data anywhere else.

You enter your budget details by clicking on the  icon and choosing budget categories (e.g. human resources, materials and supplies, etc.) for each year of requested funding. Other fields on the budget sheet are ‘summary’ fields and are non-enterable.

### Attachment List

The left menu includes an ATTACHMENT LIST option. When you click on it, you will be taken to the form where you upload all the required attachments that will accompany your submission, e.g. proposal details, Common CVs, signatures, etc. You can wait until you are finished your application, or upload as you go. Some are mandatory. The “Submit” button at the end of the application will not be available to you until all required fields and forms have been filled in/uploaded..

All attachments must be PDF files.

### Common CVs

If you have Co-Applicants on the application, their Common CVs are required. **Please create one PDF containing all co-applicant Common CVs and upload it to the list where indicated.**

### Multi-Author Applications

If others will be helping you complete the application form online, you will need to provide them with your CIRCULink username and password to access the system.

### Left menu in the Application module

<b>General Information</b>
<b>GIA Information</b>
Application Details
<b>Applicant Information</b>
Principal Investigator
<b>Project Information</b>
Research Institution
Classification
Project Summary
Lay Summary
Research Proposal
Progress Report
Previous Reviews
Overlap
<b>Financial Details</b>
Budget Information
<b>Peer Review Details</b>
Review Committees
Suggested Reviewers
Exclude Reviewers
<b>Administration</b>
Ethics and Safety
Signatures
Attachment List - 1
Attachment List - 2

## 7. Ready to Submit?

If everything is complete, the "Submit" button will no longer be gray and you can send your application to Heart & Stroke. If you see "Please Complete" against an item, you need to enter more information in that part of the application. You can hyperlink back to the part in question by clicking on the section name.

**Once you "Submit", you can view your application but it will no longer be available to you for further editing.**

Note: You will **NOT** be able to submit the application if the **deadline date and time has passed**, even if you are still logged in your application form. The system is configured such that submissions are NOT permitted after **16:00 EDT** of the submission deadline date.

## 8. Exporting Your Work

In the left menu, you will see "Export to PDF". You can export any aspect of what you have created in CIRCULink at any time. The PDF feature will ask you which parts of the data you want to export.

## 9. Monitoring Your Submissions and e-Notifications

Once you have submitted an application you can log back into CIRCULink at any time to track the status of your submission.

CIRCULink will send you email notifications periodically as your application moves forward in the review and award processes, prompting you to log-in and check its status and/or take some form of action regarding your submission. For example, CIRCULink will send you an email when the results of a competition are ready for you to review, or when it is time to 'accept/decline' a grant offer. You will need to login to CIRCULink (Front Office) to access the relevant information.

## 10. Troubleshooting and Help

In the next section, you will find some Questions & Answers that may help you if you run into problems using CIRCULink. If you cannot resolve the problem using the information below or in the main guide, please contact [research@heartandstroke.ca](mailto:research@heartandstroke.ca) during regular business hours, Monday to Friday, 9:00 to 17:00 (EDT) for assistance.

Heart & Stroke will attempt to provide support to all applicants requiring assistance leading up to the deadline of 16:00 EDT on 30 Thursday, August 2018. Please be advised that due to limited resources Heart & Stroke cannot provide any assurances of available support after 15:00 EDT, 30 Thursday, August 2018. It is the applicant's responsibility to ensure that a completed application is submitted prior to the deadline. The Heart & Stroke strongly recommends that applications be submitted well before the 16:00 EDT deadline.



## CIRCULink Q & A

1. Q. Where can I find general information on the Heart & Stroke's research programs?  
A. Visit the Heart & Stroke Research Website, [www.hsf.ca/research](http://www.hsf.ca/research).
2. Q. Can I apply for funding online for other Heart & Stroke programs?  
A. Only the Grant-in-Aid (GIA) application is available online at this time.
3. Q. After creating my User Profile and Applicant Profile, I exited the system and now I cannot see how to navigate back to get started on my application.  
A. Please see step 5 in the Guide.
4. Q. Why do I have the option to both "Save" and "Submit" on some pages of the application form?  
A. These buttons do not perform the same function. "Submit" does not automatically "Save" your work. We recommend clicking on "Save" frequently as you complete the application to avoid losing your changes. CIRCULink will automatically log you out after 45 minutes of inactivity.
5. Q. My assistant/co-applicant is going to fill out part of the online application for me. How does s/he do that?  
A. Other authors on the application need to log-in as you to add information. You need to provide them with your CIRCULink username and password. Also, point them in the direction of this User Guide.
6. Q. How does my institution's research leadership/administration staff log-in to enter the information that they need to?  
A. Notwithstanding the option immediately above, the Institutional CIRCULink portal is not available at this time. This is why the *GIA Signature Form* is provided as a downloadable form on the Signatures page. Once you have obtained required signatures, create a PDF and upload it to the Attachment List. Heart & Stroke will accept a scanned copy of the original signature uploaded into CIRCULink; electronic signatures will also be accepted. Applicants need not send an original copy of the signature page to Heart & Stroke. (Note: The expectation is that an electronic signature will hold the same weight as an original (wet) signature.)
7. Q. Why is the automatic log-out on CIRCULink short?  
A. CIRCULink will automatically log you out after 45 minutes of inactivity. This is a security feature commonly used with shared/public computers. It prevents others from accessing your application and account without your permission.
8. Q. The Attachment List doesn't say that Common CVs for Co-Applicants are 'required'. Are they?  
A. Yes. Because not all submissions will have co-applicants, we cannot make this upload mandatory or many applicants would be prevented from completing their submission. Please create one PDF containing all co-applicant Common CVs and upload it to the list where indicated. (Similarly, if you have a Co-Principal Investigator their Common CV should be combined with yours as one PDF file, and uploaded.)
9. Q. I have more documents to upload than there are spaces on the Attachment List. What should I do?  
A. Combine some of the documents (e.g. multiple budget justification pages) into one PDF and upload that file instead of multiple files.
10. Q. My system seems to be 'hanging'. Why?  
A. A couple of things may be happening:
  - The system is uploading a document (this may not be readily apparent)
  - The system may be busy processing other data

In either case, we recommend waiting several minutes before taking any action.
11. Q. I'm getting an error message that says I'm "already logged in" but I cannot navigate anywhere in the system.  
A. Please see question immediately above.

12. Q. I'm trying to "Submit" my application to Heart & Stroke, but I'm unable to do so.
- A. One of the following may have happened:
- A mandatory field within the application is blank.
  - A required document has not yet been uploaded to the Attachment List.
  - Total budget requested exceeded the maximum allowable limit. Please refer to the Submission Guidelines.
  - The deadline (date and time) for application submission has past.
  - You are trying to submit a GIA application form from a previous year. Note; if you have created a previous year's GIA application form and it has not been submitted, the CIRCULink will allow you to update (i.e. enter and save) the information, however, CIRCULink will **NOT** permit you to submit the old GIA application form. Each GIA application form is specific to a given competition. (e.g. for the 2019/20 GIA competition, CIRCULink will permit you to update last year's 2018/19 GIA form but will not allow you to submit it.) Please ensure you are working on the correct competition application form.

In the left menu of CIRCULink, click on "Submit Application" (below the Attachment List option). This will take you to a screen showing the status of your application. If you see "Please Complete" against an item, you need to enter more information in that part of the application. You can hyperlink back to the part in question by clicking on the section name.

If you see a date or "No Input Required", it means you have completed it or there is no action you need to take.

13. Q. Can I update a previous year's GIA application form and submit it for the current competition?
- A. No. Each GIA application form is specific to a given competition. (e.g. for the 2019/20 GIA competition, CIRCULink will allow you to update last year's 2018/19 GIA form but will **NOT** allow you to submit it.) A new application must be created for each year's competition.
14. Q. The formatting of PDFs when I export my work aren't structured the way I would like. Can I change the settings?
- A. No, the formatting is system-generated and cannot be changed at this time.
15. Q. In my email notifications through CIRCULink, my project name appears twice. Why?
- A. This is system-generated and cannot be changed at this time.
16. Q. Some colleagues recently received an e-notification from CIRCULink that their applications have been successfully submitted, but I have not. We all applied to the same competition.
- A. Check your "JUNK" email folder and be sure to add this email address to your "safe" list in your email software so your computer will recognize the system in future: CIRCULink@heartandstroke.ca
17. Q. I recently changed institutions/moved provinces and my Applicant Profile is out-of-date.
- A. Please see step 5 in the Guide.