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## 2018 HEALTH PROFESSIONAL-INVESTIGATOR COMPETITION



### MSFHR APPLYNET TUTORIAL

Host Institution Approval

Last updated: **November 27, 2017**

## Account Creation

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The Host Institution workgroup membership is set up and managed by the Michael Smith Foundation for Health Research. To add or delete a member to the Host Institution workgroup, a Host Institution representative sends an email to the MSFHR Help Desk at [helpdesk@msfhr.org](mailto:helpdesk@msfhr.org) with the following information:

- In the subject line, please specify if requesting to: Add or Delete a Workgroup Member
- First and Last Name of the Workgroup Member
- Email Address of the Workgroup Member

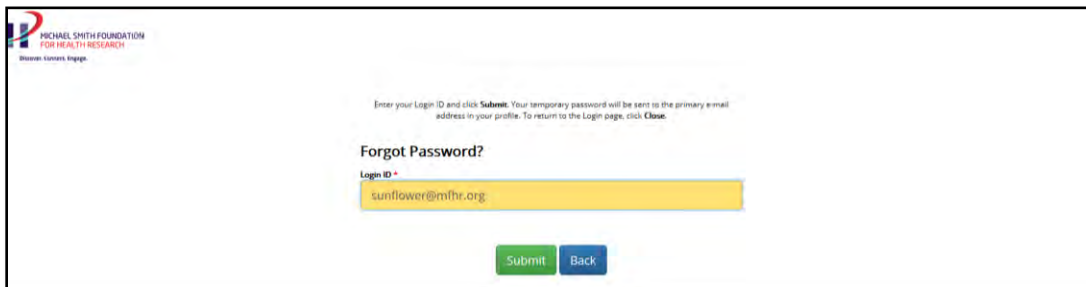
## Starting the Process

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You will receive an email notification from MSFHR ApplyNet with your login and temporary password.

Login to [MSFHR ApplyNet](#).

If you have forgotten your login ID for your MSFHR ApplyNet account, please contact the MSFHR help desk at [helpdesk@msfhr.org](mailto:helpdesk@msfhr.org) or call 604-714-6609. If you have forgotten your password please click on the link, [Forgot Password?](#) Link, enter your Login ID and click Submit.



MICHAEL SMITH FOUNDATION  
FOR HEALTH RESEARCH  
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Enter your Login ID and click **Submit**. Your temporary password will be sent to the primary e-mail address in your profile. To return to the Login page, click **Close**.

**Forgot Password?**

Login ID \*

sunflower@mshr.org

Submit Back



A password reset instruction will be sent to your email address.

Password requirements:

- At least 8 characters and no more than 16
- At least one upper-case letter
- At least one lower-case letter
- At least one digit (0-9)
- At least one special character
- Different from your last 8 passwords
- **Should not contain your first or last name**

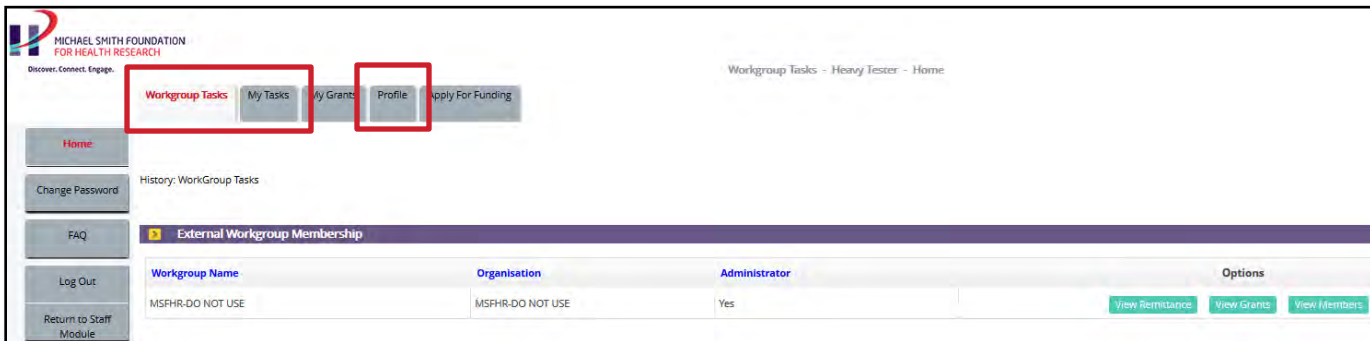
## Home Page

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The **Home** page has five tabs: My Tasks, Workgroup Tasks, My Grants, Profile, and Apply for Funding

Of these five tabs, only three are applicable to the Host Institution workgroup member:

- My Tasks
- Workgroup Tasks
- Profile



The screenshot shows the MSFHR ApplyNet Home Page. The navigation tabs are: Workgroup Tasks (highlighted with a red box), My Tasks, My Grants, Profile (highlighted with a red box), and Apply For Funding. The main content area displays a table for External Workgroup Membership. The table has columns for Workgroup Name, Organisation, Administrator, and Options. The data row shows MSFHR-DO NOT USE for both Workgroup Name and Organisation, and Yes for Administrator. There are buttons for View Remittance, View Grants, and View Members.

Workgroup Name	Organisation	Administrator	Options
MSFHR-DO NOT USE	MSFHR-DO NOT USE	Yes	<a href="#">View Remittance</a> <a href="#">View Grants</a> <a href="#">View Members</a>



## System Navigation – Assignment of Host Institution Approval Tasks to Personal Task

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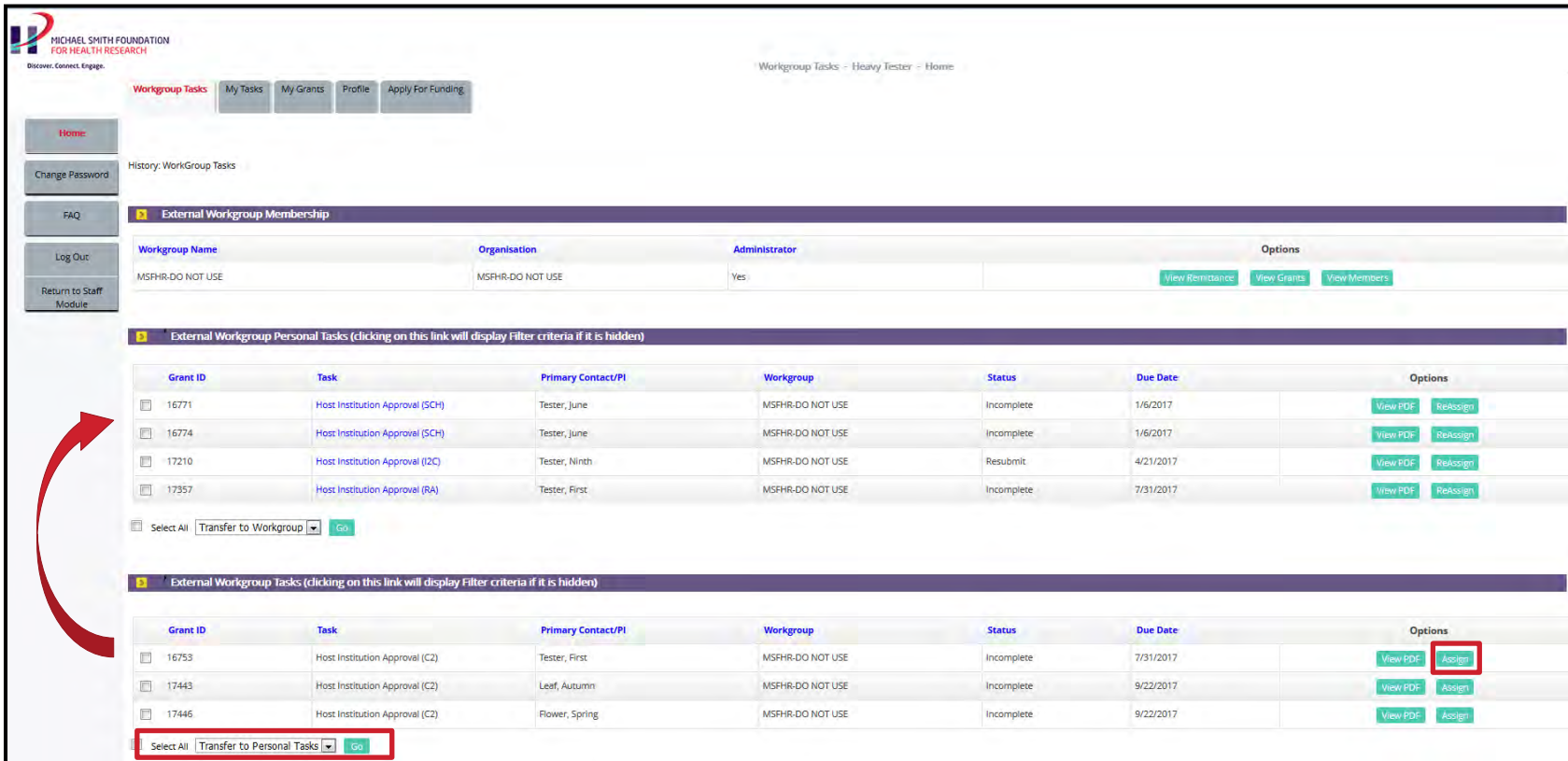
On the **Home** page:

- Go to the **Workgroup Tasks** tab
- Scroll down to the **External Workgroup Tasks** section
- To assign a task to the workgroup member select the grant ID(s) and:
  1. Choose **Transfer to Personal Task** from the drop down list, if assigning multiple tasks **or**
  2. Choose the option **Assign** if transferring only one task to the Personal Task section.

Once a task(s) has been claimed by a host institution workgroup member, the following happens:

1. The claimed task(s) becomes an active hyperlink.
2. The claimed task(s) also becomes available on the home page, My Task page.
3. The claimed task (s) will **no** longer be available / accessible to the other host institution workgroup members.
4. The claimed task(s) can only be **re-assigned** by the same member back to the host institution workgroup.





The screenshot displays the MSFHR ApplyNet interface. At the top, the user is logged in as 'Heavy Tester' and is viewing the 'Workgroup Tasks' page. The navigation menu includes 'Workgroup Tasks', 'My Tasks', 'My Grants', 'Profile', and 'Apply For Funding'. A sidebar on the left contains links for 'Home', 'Change Password', 'FAQ', 'Log Out', and 'Return to Staff Module'. The main content area is divided into several sections:

- External Workgroup Membership:** A table showing membership for the 'MSFHR-DO NOT USE' workgroup. The table has columns for 'Workgroup Name', 'Organisation', 'Administrator', and 'Options'. The 'Options' column includes 'View Remittance', 'View Grants', and 'View Members'.
- External Workgroup Personal Tasks:** A table showing tasks for the 'MSFHR-DO NOT USE' workgroup. The table has columns for 'Grant ID', 'Task', 'Primary Contact/PI', 'Workgroup', 'Status', 'Due Date', and 'Options'. The 'Options' column includes 'View PDF' and 'Reassign'. A red arrow points to this section.
- External Workgroup Tasks:** A table showing tasks for the 'MSFHR-DO NOT USE' workgroup. The table has columns for 'Grant ID', 'Task', 'Primary Contact/PI', 'Workgroup', 'Status', 'Due Date', and 'Options'. The 'Options' column includes 'View PDF' and 'Assign'. A red box highlights the 'Assign' button in this section.

At the bottom of the 'External Workgroup Tasks' section, there is a 'Select All' dropdown menu with 'Transfer to Personal Tasks' selected and a 'Go' button. A red box highlights this area.

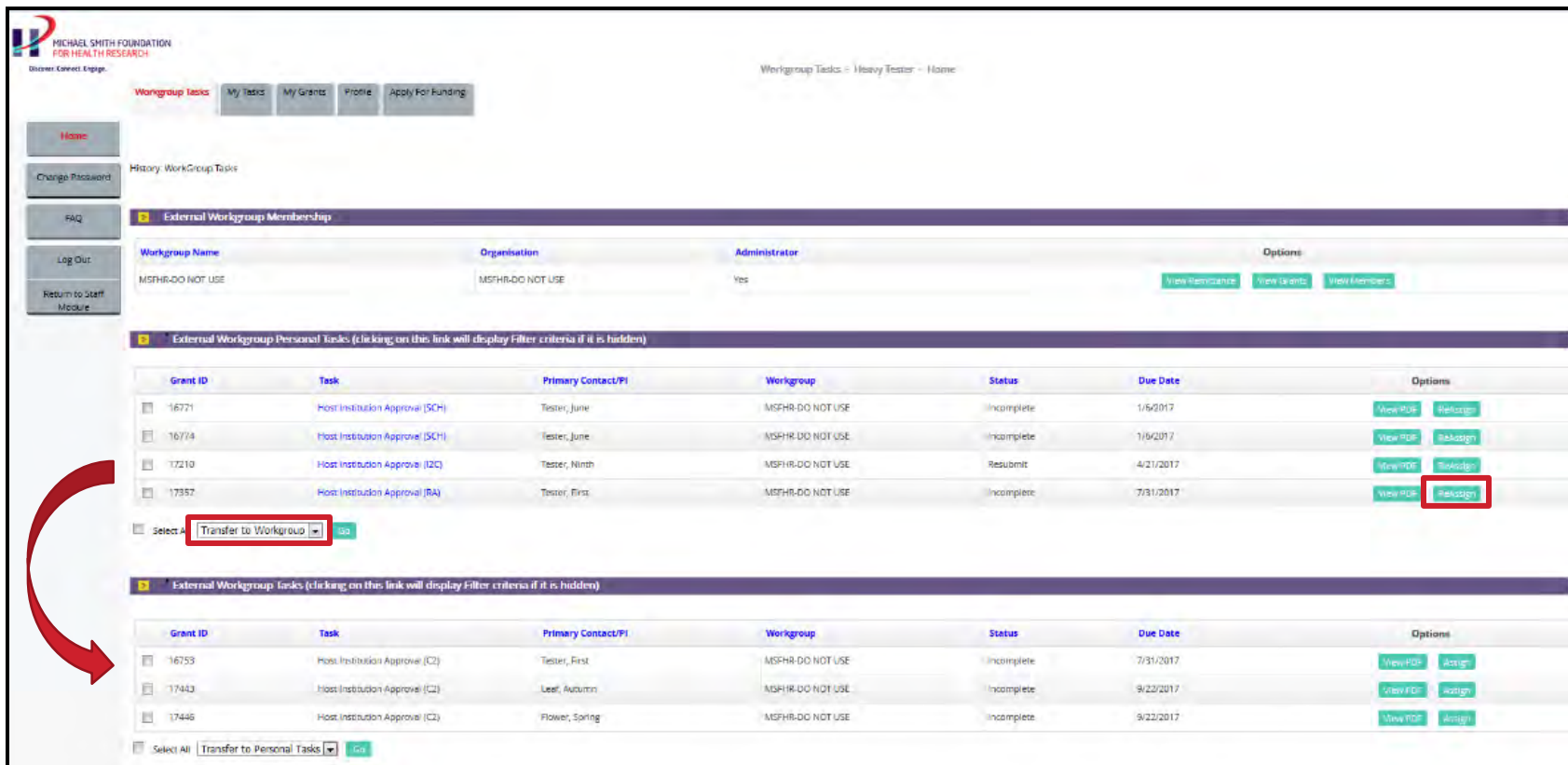




## System Navigation – Re-Assignment of Host Institution Approval Tasks Back to the Workgroup

To reassign a task back to the workgroup, the member may simply select the task(s) and:

1. Choose **Transfer to Workgroup** from the drop down list, if transferring multiple tasks or
2. Choose the option **Reassign** if transferring only one task.



The screenshot displays the 'Workgroup Tasks' page for a user named 'Heavy Tester'. The page shows a list of tasks under the heading 'External Workgroup Personal Tasks'. A red arrow points to the 'Transfer to Workgroup' dropdown menu in the 'Select All' row of the first table. The second table shows a task with the 'Reassign' button highlighted in a red box.

Grant ID	Task	Primary Contact/PI	Workgroup	Status	Due Date	Options
16721	Host Institution Approval (SCH)	Tester, June	MSFHR-DO NOT USE	Incomplete	1/6/2017	View PDF Reassign
16724	Host Institution Approval (SCH)	Tester, June	MSFHR-DO NOT USE	Incomplete	1/9/2017	View PDF Reassign
17210	Host Institution Approval (IQ)	Tester, Ninth	MSFHR-DO NOT USE	Resubmit	4/21/2017	View PDF Reassign
17357	Host Institution Approval (BA)	Tester, First	MSFHR-DO NOT USE	Incomplete	7/31/2017	View PDF Reassign

Grant ID	Task	Primary Contact/PI	Workgroup	Status	Due Date	Options
16753	Host Institution Approval (C2)	Tester, First	MSFHR-DO NOT USE	Incomplete	7/31/2017	View PDF Assign
17443	Host Institution Approval (C2)	Leaf, Autumn	MSFHR-DO NOT USE	Incomplete	9/22/2017	View PDF Assign
17446	Host Institution Approval (C2)	Flower, Spring	MSFHR-DO NOT USE	Incomplete	9/22/2017	View PDF Assign



Reassignment of tasks back to the workgroup is done for various reasons such as:

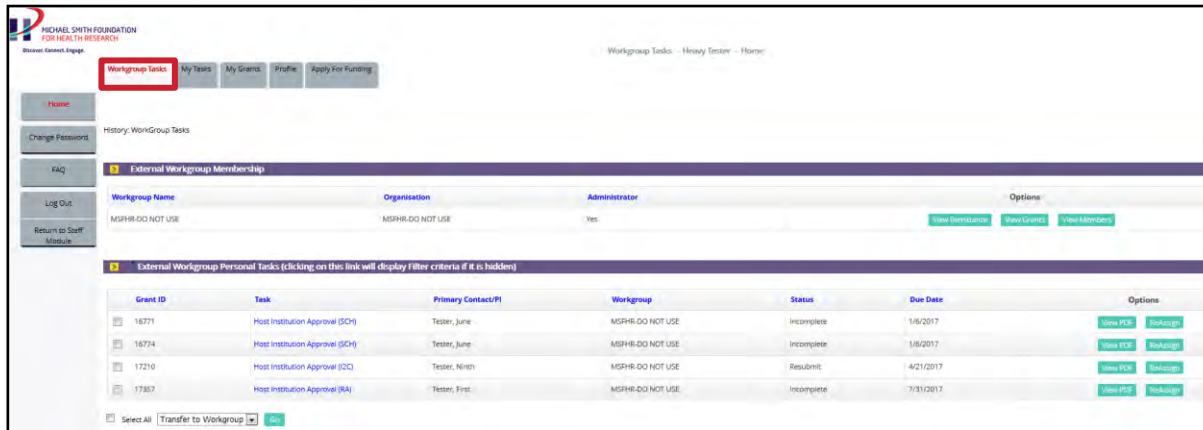
- Another member needs to review and approve the previously claimed application;
- The previous member becomes unavailable; or
- To count the number of applications that are still for review by end of day.



## Host Institution Approval of Applications

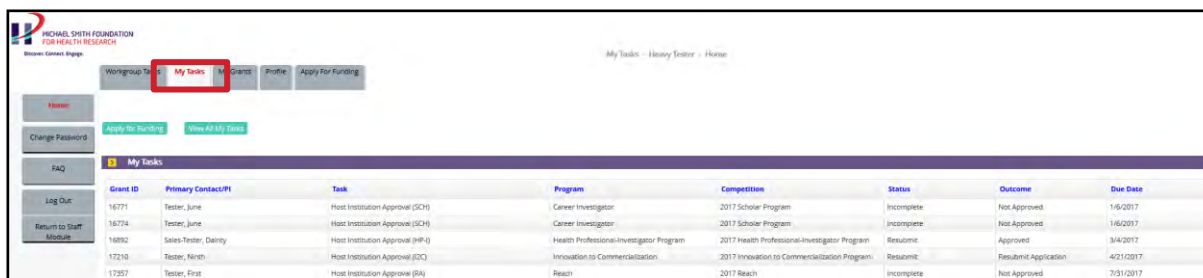
The Host Institution Approval can be done in either of these two places:

### 1. Workgroup Task tab



Grant ID	Task	Primary Contact/PI	Workgroup	Status	Due Date	Options
16771	Host Institution Approval (SCH)	Tester, June	MSFHR-DO NOT USE	Incomplete	1/6/2017	<a href="#">View PDF</a> <a href="#">Reassign</a>
16774	Host Institution Approval (SCH)	Tester, June	MSFHR-DO NOT USE	Incomplete	1/6/2017	<a href="#">View PDF</a> <a href="#">Reassign</a>
17210	Host Institution Approval (SCH)	Tester, Ninth	MSFHR-DO NOT USE	Resubmit	4/21/2017	<a href="#">View PDF</a> <a href="#">Reassign</a>
17367	Host Institution Approval (RA)	Tester, First	MSFHR-DO NOT USE	Incomplete	7/31/2017	<a href="#">View PDF</a> <a href="#">Reassign</a>

### 2. My Task tab

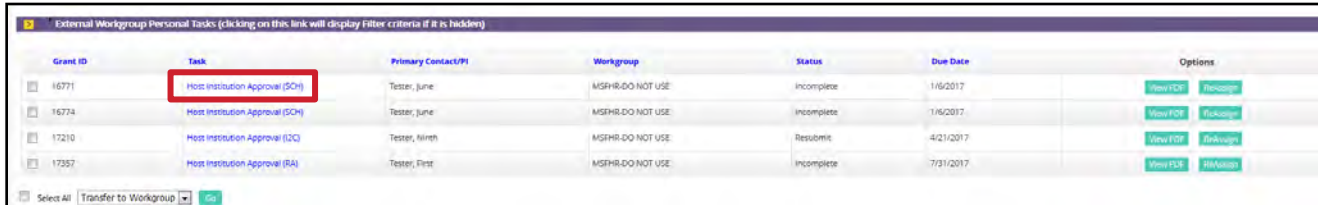


Grant ID	Primary Contact/PI	Task	Program	Competition	Status	Outcome	Due Date
16771	Tester, June	Host Institution Approval (SCH)	Career Investigator	2017 Scholar Program	Incomplete	Not Approved	1/6/2017
16774	Tester, June	Host Institution Approval (SCH)	Career Investigator	2017 Scholar Program	Incomplete	Not Approved	1/6/2017
16892	Sales-Tester, Darcy	Host Institution Approval (PI-I)	Health Professional-Investigator Program	2017 Health Professional-Investigator Program	Resubmit	Approved	3/4/2017
17210	Tester, Ninth	Host Institution Approval (SCH)	Innovation to Commercialization	2017 Innovation to Commercialization Program	Resubmit	Resubmit Application	4/21/2017
17357	Tester, First	Host Institution Approval (RA)	Reach	2017 Reach	Incomplete	Not Approved	7/31/2017





To access the task, click on the **Host Institution Approval** hyperlink.

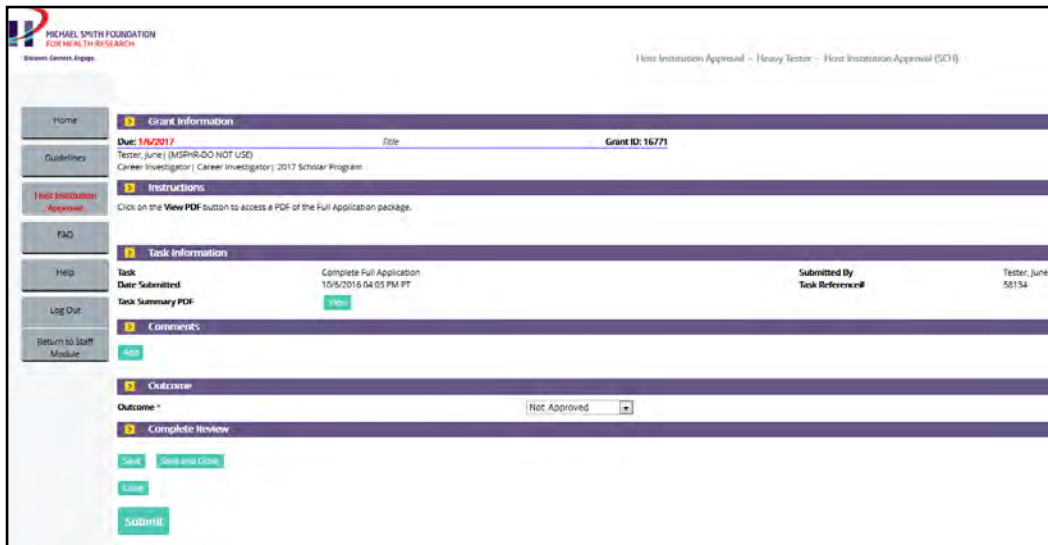


Grant ID	Task	Primary Contact/PI	Workgroup	Status	Due Date	Options
16771	Host Institution Approval (SCH)	Tester, June	MSFHR-DO NOT USE	Incomplete	1/6/2017	View PDF, Helpdesk
16774	Host Institution Approval (SCH)	Tester, June	MSFHR-DO NOT USE	Incomplete	1/6/2017	View PDF, Helpdesk
17210	Host Institution Approval (SCH)	Tester, Niren	MSFHR-DO NOT USE	Resubmit	4/21/2017	View PDF, Helpdesk
17357	Host Institution Approval (BA)	Tester, First	MSFHR-DO NOT USE	Incomplete	7/31/2017	View PDF, Helpdesk

To open the application for review, click on the **View PDF** button found in the **Task Information** section.

To approve the application, select appropriate option from the drop down list available in the **Outcome** section.

Click **Submit** when finished. Repeat the process until all applications are submitted.



Home | Grant Information | Instructions | Task Information | Comments | Outcome | Complete Review

Due: 1/6/2017 | Title: Career Investigator | Career Investigator | 2017 Scholar Program | Grant ID: 16771

Task: Complete Full Application | Date Submitted: 10/9/2016 04:03 PM PT | Submitted By: Tester, June | Task Reference #

Outcome: Not Approved

Buttons: Save, Save and Close, Cancel, Submit

**Note:** The **Outcome** is final after you click **Submit**. Any change to the **Outcome** must be requested through MSFHR. To request, email [helpdesk@msfhr.org](mailto:helpdesk@msfhr.org) and provide the following information:

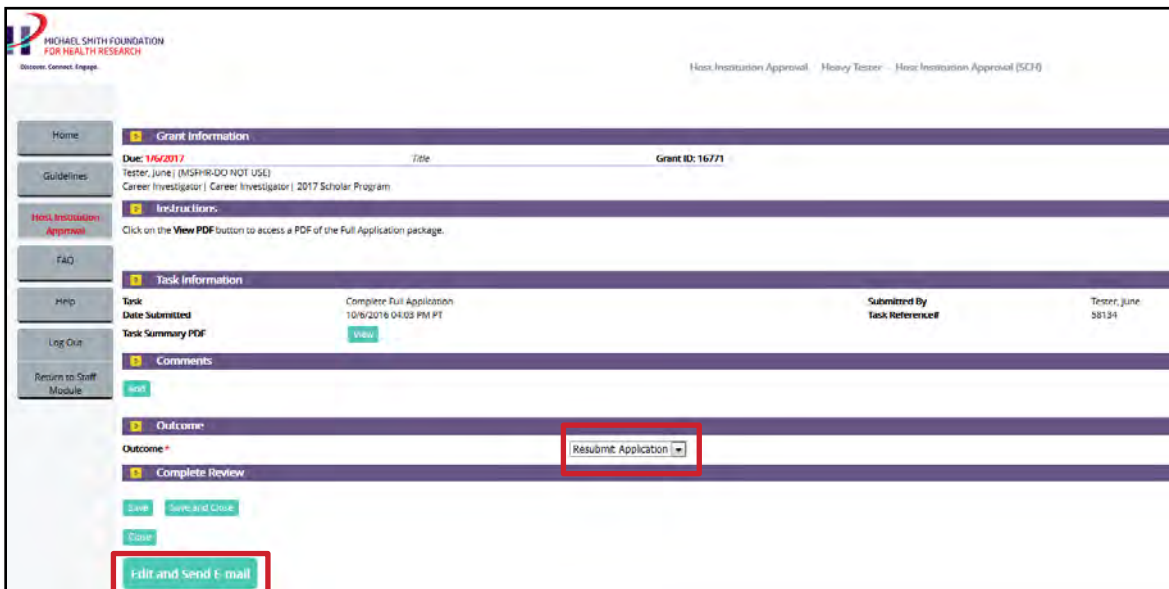
- Grant ID #
- Applicant's Name
- Reason for the change of outcome



## Host Institution Approval of Application – “Resubmit Application” Outcome

If the host institution requires clarification or additional requirements from the applicant, the host institution can request for the resubmission of the application.

In the Outcome section, select the **Resubmit Application** from the drop down list:

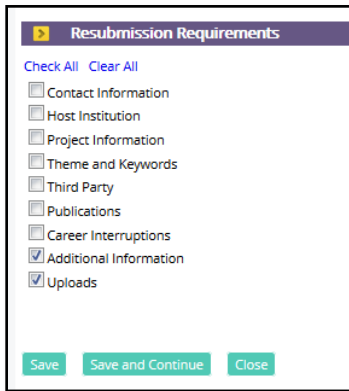


The screenshot displays the MSFHR ApplyNet interface for Host Institution Approval. The page includes a navigation sidebar on the left with options like Home, Guidelines, Host Institution Approval (highlighted), FAQ, Help, Log Out, and Return to Staff Module. The main content area shows sections for Grant Information, Instructions, Task Information, Comments, Outcome, and Complete Review. In the Outcome section, a dropdown menu is open, showing 'Resubmit Application' as the selected option. Below this, there are buttons for 'Save', 'Send and Close', 'Close', and 'Edit and Send E-mail' (highlighted with a red box).

When the page refreshes, click the **Edit and Send Email** button.



From the Resubmission Requirements list, check the pages of the Full Application that requires resubmission.



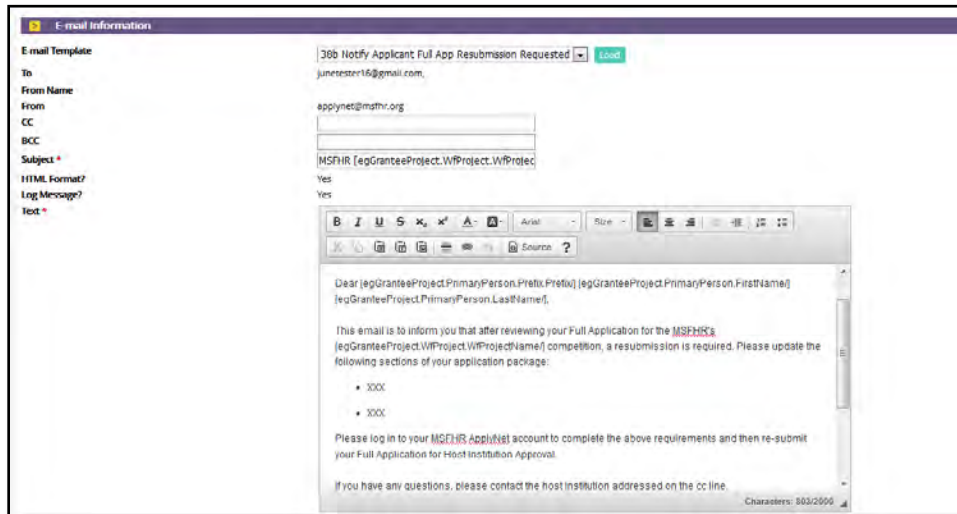
**Important Note:** When the Full Application is returned to the applicant, they will only have access to the sections you have selected. If you would like the applicant to have access to all the pages in the Full Application, please **check all** boxes.

Click **Save and Continue**

An email template will be displayed. Edit the following fields:

1. CC line – add the email address of the host institution contact(s) to ensure that the applicant knows who the request came from and to save a copy of the email correspondence in your inbox, for your records.
2. Bullets – identify which part of the application page the applicant needs to resubmit.  
*For example: Upload section – replace CCV with **final** version*





Should you wish to include an e-mail attachment, you may do so in the **E-mail Attachments** section.

When done, please click **Continue**.

The page will refresh and will display your edited email, when done, click **Send and Submit**.

The applicants will only have until the MSFHR Complete Full Application deadline to resubmit their application back to the Host Institution.

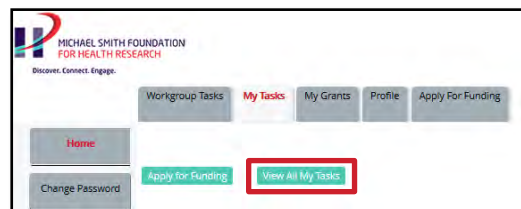
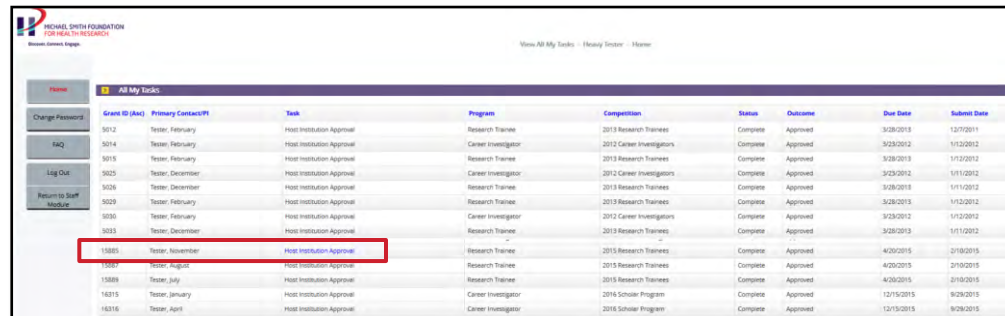
Once the applicant has resubmitted their application, Host Institution Approval task will go back to the Personal Task (My Task) of the workgroup member who sent the resubmit application request.



## Review of Submitted Tasks

Once you have completed and submitted the **Host Institution Approval** tasks, it will disappear from both the **My Tasks** and **Workgroup Tasks-Personal Tasks** pages. To view all of the tasks that had been approved and submitted or requested for resubmission:

- Click on **View All My Tasks** from the Home page.
- Click on the **Host Institution Approval** hyperlink to view a read-only copy of the submitted task. You can view the application again by clicking on **View PDF** in the **Grant Information** section.

Grant ID (link)	Primary Contact/PI	Task	Program	Competition	Status	Outcome	Due Date	Submit Date
5012	Tesler, February	Host Institution Approval	Research Trainee	2013 Research Trainees	Complete	Approved	3/08/2013	12/7/2011
5014	Tesler, February	Host Institution Approval	Career Investigator	2012 Career Investigators	Complete	Approved	3/23/2012	1/12/2012
5015	Tesler, February	Host Institution Approval	Research Trainee	2013 Research Trainees	Complete	Approved	3/28/2013	1/12/2012
5025	Tesler, December	Host Institution Approval	Career Investigator	2012 Career Investigators	Complete	Approved	3/23/2012	1/11/2012
5026	Tesler, December	Host Institution Approval	Research Trainee	2013 Research Trainees	Complete	Approved	3/08/2013	1/11/2012
5029	Tesler, February	Host Institution Approval	Research Trainee	2013 Research Trainees	Complete	Approved	3/26/2013	1/12/2012
5030	Tesler, February	Host Institution Approval	Career Investigator	2012 Career Investigators	Complete	Approved	3/23/2012	1/12/2012
5035	Tesler, December	Host Institution Approval	Research Trainee	2013 Research Trainees	Complete	Approved	3/28/2013	1/11/2012
15805	Tesler, December	Host Institution Approval	Research Trainee	2015 Research Trainees	Complete	Approved	4/30/2015	2/18/2015
15807	Tesler, August	Host Institution Approval	Research Trainee	2015 Research Trainees	Complete	Approved	4/20/2015	2/18/2015
15808	Tesler, July	Host Institution Approval	Research Trainee	2015 Research Trainees	Complete	Approved	4/20/2015	2/18/2015
14315	Tesler, January	Host Institution Approval	Career Investigator	2014 Scholar Program	Complete	Approved	12/15/2015	9/28/2015
14316	Tesler, April	Host Institution Approval	Career Investigator	2016 Scholar Program	Complete	Approved	12/15/2015	9/28/2015





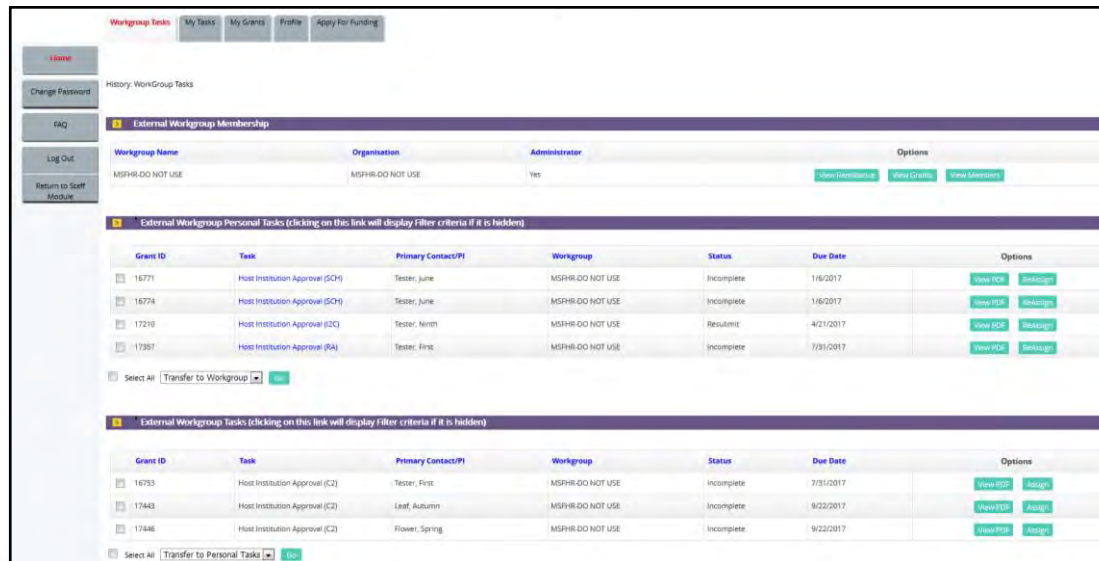
## Other Helpful Information

### Descriptions and screenshots of the different sections within the Workgroup Task Tab

#### Workgroup Tasks

There are three sections in the **Workgroup Tasks** tab:

1. **External Workgroup Membership** – identifies the host institution’s workgroup name and lists the current approvers from the host institutions (View Members)
2. **External Workgroup Personal Tasks** – displays a list of **claimed/assigned** Host Institution Approval tasks that have been claimed by the workgroup member.
3. **External Workgroup Tasks** – displays a list of all the **unclaimed/unassigned** Host Institution Approval tasks for review.



The screenshot displays the 'Workgroup Tasks' interface. It features a navigation menu on the left and three main sections:

- External Workgroup Membership:** A table with columns for Workgroup Name, Organisation, Administrator, and Options. It shows one entry for 'MSFHR-DO NOT USE' with a 'Yes' administrator and buttons for 'Open Collaborate', 'View Grants', and 'View Members'.
- External Workgroup Personal Tasks:** A table with columns for Grant ID, Task, Primary Contact/PI, Workgroup, Status, Due Date, and Options. It lists four tasks with statuses like 'Incomplete' and 'Resubmit'. Buttons for 'View PCR' and 'Reassign' are visible.
- External Workgroup Tasks:** A table with columns for Grant ID, Task, Primary Contact/PI, Workgroup, Status, Due Date, and Options. It lists three tasks, all with an 'Incomplete' status. Buttons for 'View PCR' and 'Assign' are visible.

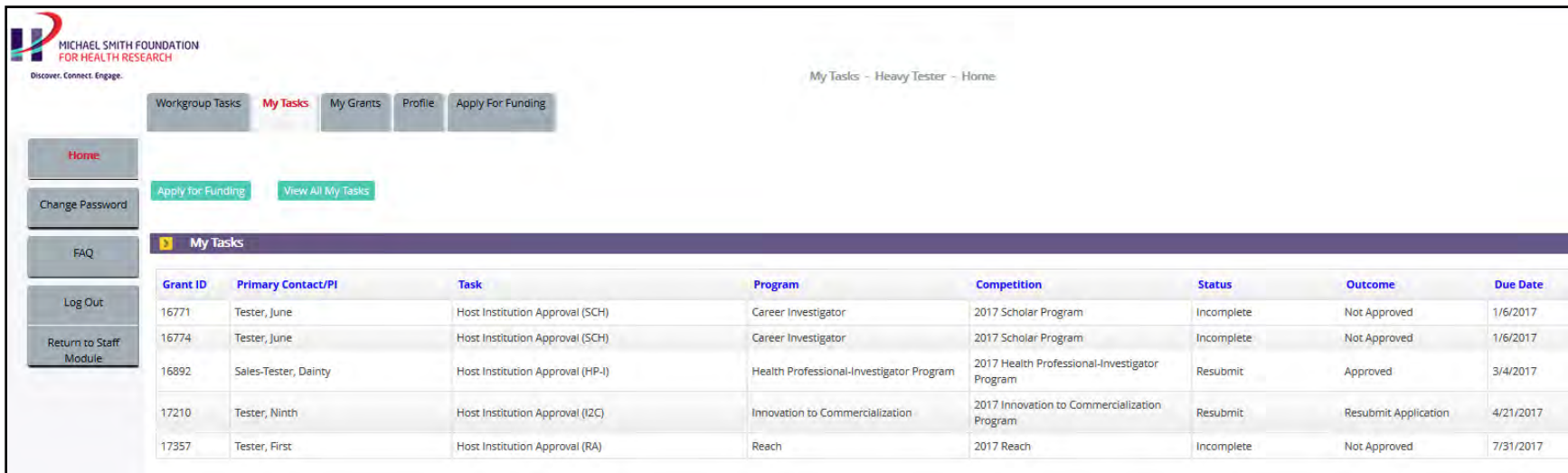


## My Tasks

In the **My Tasks** tab, you will see two buttons:

- Apply for Funding (applicable **only** to applicants)
- View All My Tasks (displays a list of tasks that have been completed and submitted by the Host Institution workgroup member or user)

The **My Tasks section** displays all the tasks that have been claimed by a workgroup member for their review.



My Tasks - Heavy Tester - Home

Workgroup Tasks **My Tasks** My Grants Profile Apply For Funding

Home

Change Password Apply for Funding View All My Tasks

FAQ

Log Out

Return to Staff Module

Grant ID	Primary Contact/PI	Task	Program	Competition	Status	Outcome	Due Date
16771	Tester, June	Host Institution Approval (SCH)	Career Investigator	2017 Scholar Program	Incomplete	Not Approved	1/6/2017
16774	Tester, June	Host Institution Approval (SCH)	Career Investigator	2017 Scholar Program	Incomplete	Not Approved	1/6/2017
16892	Sales-Tester, Dainty	Host Institution Approval (HP-I)	Health Professional-Investigator Program	2017 Health Professional-Investigator Program	Resubmit	Approved	3/4/2017
17210	Tester, Ninth	Host Institution Approval (I2C)	Innovation to Commercialization	2017 Innovation to Commercialization Program	Resubmit	Resubmit Application	4/21/2017
17357	Tester, First	Host Institution Approval (RA)	Reach	2017 Reach	Incomplete	Not Approved	7/31/2017



## Profile

In the **Profile** tab, the host institution workgroup member can update their contact information or change their password by selecting the [View My Contact Details](#) hyperlink.

