# My Research Applications (MRA) Block Grant User Manual

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## **MRA Block Grant Overview**

Block grants are research programs for which the Division of the Vice-President, Research & Innovation (VPRI) determines an academic unit's allocation of grant funds, but the determination of individual recipients is managed by the academic unit itself. An example of a block grant program is the <u>Social</u> <u>Sciences and Humanities Research Council (SSHRC) Institutional Grant (SIG)</u>.

PIs can now apply to Block Grants (e.g.: SIG program) by submitting an MRA through the My Research (MR) platform. The MRA will then be directed to an academic unit's Business Officer for review and approval. Once approved by the Business Officer, the MRA would be directed to an academic unit's Lead for the usual MRA review and approval before completing the approval process at Research Services.

# **Submitting MRA for Block Grant Programs**

To apply for a Block Grant program, PIs will now follow the same process for submitting funding applications. A PI will submit an MRA through the <u>My Research (MR) portal</u>.

PIs may apply for Block Grant programs by selecting the program in the Sponsors/Programs Page in MRA. In the steps listed below, SSHRC Institutional Grant (SIG) program is used as an example:

1. To select SSHRC as the sponsor, click the drop-down menu button for the "Government of Canada Agencies & Departments"

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	Submit Application	> University of Toronto Research Programs				
		> Industry				
		> Other Sponsors, e.g. Foundations, Associations, Societies				
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2. To select the SIG program, click the drop-down menu button for the "Social Sciences and Humanities Research Council-SSHRC"

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3. Enter the total amount requested for the SIG program

For detailed steps on how to fill out and submit an MRA, please visit the help documentation available on the <u>MRA webpage</u> or download the full <u>MRA user guide</u> and read the "Submitting a Research Application for Approval" section.

# Reviewing MRA for Block Grant Programs as a Business Officer

When a PI submits an MRA for a Block Grant Program, the application is directed to the Business Officer (BO) for the administering unit selected by the PI. The BO can review the application from their inbox by clicking on the application title/Subject. This will open the review screen in a new tab. Your browser should allow pop-ups (see <u>Allowing Pop-ups in Browsers</u> section).

Your inbox will be cleared from the task once you approve, return, or reject the application. You may use the refresh button on the side to update your inbox.

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#### 1. Principal Investigator Information

The PI information is displayed by clicking on the PI's name in the top section of the screen. This will display an **Applicant Information** dialogue box that shows the PI's contact information and appointment data such as **Appointment Status**, **Appointment End Date**, **Rank**, **Dept of Primary Appointment**, etc.

#### 2. Co-investigators/Collaborators Information

This function will show if the PI has listed any investigator as a Co-Investigator or Collaborator by clicking on the **Collaborators/Co-Investigators** link in the top section of the screen. The **Institution Name** field will display the institutional affiliation of the Collaborator/Co-Investigator. It is possible that this will be blank as there are Collaborators/Co-Investigators in the RIS database where an institutional affiliation has not been recorded. The **E-Mail** field will display the individual's e-mail address. The **Signed** indicator will show when a Collaborator/Co-Investigator with a U of T appointment has logged on to the system and endorsed the application.

#### 3. Display Application

Click on the **Display Application** button to view the entire application record. You can navigate through the different pages from the menu on the left-hand side of the screen or navigate each screen in sequence by clicking the **Next** button on the right-hand side of the screen.

#### 4. Status History

The **Status History** lists the statuses and users through which the Application record has passed. This report may also be accessed from the summary and approval screen by clicking the **Status History** button in the top right-hand corner, or from the application record by clicking on the **Display** 

Application button, then the 🕒 (clock) icon.

#### 5. Sponsors/Programs

The **Sponsors/Programs** section allows you to view the Sponsors and Programs selected/input by the PI. If this is a SIG application, it will be indicated in this section. This section also lists the **Amount Requested** by the PI.

#### 6. Block Grant Allocation Information

The Block Grant Allocation Information section contains the following fields:

- Allocated Amount: The total allocated amount for the PI's unit.
- **Unallocated Amount:** The remaining unallocated amount for the PI's unit.
- Amount awarded: Enter the amount awarded to the PI in the text field.
- **PI Funds Center:** Select the PI Funds Center by clicking the Select Funds Center button and adding the fund center by clicking the O button.

Note: If the PI Funds Center is not listed, please contact the RAISE Help Desk.

• **Cost Center:** Type in the cost center number in the text field.

#### 7. Attachments

From the **Attachments** table you may download any attached document that has been uploaded by any user in the hierarchy. You may also attach any other relevant document. To attach a document, click the "+" or **Click on + to add Attachment** button, fill out the required fields and upload the document(s). You can also attach documents from the **Display Application** window  $\rightarrow$  **Document Attachments** section.

**NB:** Attached documents may be viewed by anyone in the approval hierarchy.

#### 8. Notes

The Notes section of the summary and approval screen stores all notes and email notifications related to the application record in reverse chronological order. To create a note, click on the **+ Add Notes** button in the **Notes** --> **User Notes** section. You will be prompted to fill out the **Subject** and **Note** fields. You also have the option to **Notify Applicant** by checking the box and/or **Notify Others** to search the U of T database. All notes will have a title/subject and are date and time stamped with the user's ID.

#### 9. Save Button

You may save your progress at any point by clicking the "Save" button. Please note that saving the application does not approve it.

#### 10. Return to PI vs. Reject Application

#### Return to PI:

If you return an application to the PI, the PI can still edit the same MRA before re-submitting it for review. The application will be pushed to the PI's inbox in MR.

After clicking Return to PI, you will be required to enter a note by completing the **Subject** and **Note** fields in the dialogue box.

#### Reject

If you reject an application, the PI can no longer edit this application or re-submit it. If the PI wants to apply again, they will need to restart the application process by creating a new MRA and submitting it for review.

After clicking the Reject button, you will be required to enter a note by completing the **Subject** and **Note** fields in the dialogue box.

Once you have returned or rejected the application you will see a task completion screen. Close the tab to return to the inbox.

#### 11. Approve Application

To approve an application, click the approve button and confirm the undertaking.

Once you have Approved the application you will see a task completion screen. Close the tab to return to the inbox.

## **Reviewing Allocation Summary for Units**

You may view the Block Grant allocation summary for your unit(s) from My Research  $\rightarrow$  Applications & Agreements  $\rightarrow$  Allocation Summary. This will open the Allocation Summary Screen in a new tab. Your browser should allow pop-ups (see <u>Allowing Pop-ups in Browsers</u> section).

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The allocation summary screen allows you to view the Allocation amounts for your unit(s). You may also view the awarded amounts and unallocated amounts remaining.

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Use Filter Bar to find	available allocations:	2		Hide Filter Bar	Filters Go 🔍	Contact Help Desk	
Start Date:	End Date:	C	Program Name:	C			
Allocations (4)				Enter Program Name or part	t of it (search existing)	Q	<b>3 4 5 6</b> ∿ ⊫ ⊚ <b>6</b>
Allocation Number	Program	Start Date	End Date	Unit <b>1</b>	Allocation Amount	Awarded Amount	Unallocated Amount
8000002	SIG	Mar 1, 2022	Mar 31, 2022	Faculty of Social Work	20,000.00	0.00	20,000.00
8000002	SIG	Mar 1, 2022	Mar 31, 2022	Dept of Physiology	25,000.00	2,800.00	22,200.00
	SIG	Feb 1, 2022	Mar 31, 2022	Dept of Physiology	50,000.00	3,000.00	47,000.00
8000000							

- 1. Business officers may review the allocation amounts, awarded amounts and unallocated amounts per unit:
  - a. Allocation Amount: the amount released to the unit per competition cycle
  - b. Awarded Amount: the amount awarded from the allocated amount to successful recipients in the unit
  - c. Unallocated Amounts: the remaining unallocated amount for the unit
- 2. You may filter through the list using **Start Date** and **End Date** by clicking the  $\square$  icon and specifying the type of Time Period and selecting the date(s). You may also filter through the list using the **Program Name** text field. The  $\square$  icon allows you to filter using sponsor ID and/or program ID.
- 3. The **Sort** button allows you to sort through your applications in the ascending or descending order of Allocation Number or Start Date.
- 4. The **Group** button allows you to group your applications in the ascending or descending order of Program or Start Date.
- 5. The **Personalisation** button allows you to select which columns you want to view or hide in the list.
- 6. The **Export to Excel** button will download all applications to a Microsoft Excel file.
- 7. The **Contact Help Desk** button allows you to send a message to the RAISE Help Desk for any technical questions.

# Reviewing MRA for Block Grant Programs as a Unit Head

When a Business officer (BO) approves an MRA for a Block Grant Program, the application is directed to the Unit Head for the administering unit. The Unit Head can review the application from their inbox by clicking on the application title/Subject. This will open the review screen in a new tab. Your browser should allow pop-ups (see <u>Allowing Pop-ups in Browsers</u> section).

The review process for SIG applications by the Unit Heads is the same as the review process for MRA applications. The review screen for Block Grants will have additional information on Allocation Information.

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Sponsor	Program	Amount Requested	IDC Amount Requested	Currency	Amount Requested(in CAD)	IDC Amount Requested(in CAD)	IDC Rate (%)	Expected ID Rate (%
Social Sciences and Humanities Research Council (SSHRC)	SIG	10000.00	0.00	CAD	10000.00	0.00	0.000	0.00
		<b>[</b>						
				ed Amount: 2500				
			Unallocate	ed Amount: 1220	0.00			
			Amoun	nt Awarded: 1000	0.00			
			PI Fu	und Centre: 2001	27			
				ost Center: 1022				

The Block Grant Allocation Information section contains the following fields:

- Allocated Amount: The total allocated amount for the PI's unit.
- Unallocated Amount: The remaining unallocated amount for the PI's unit.
- Amount awarded: The amount awarded to the PI inputted by the BO.
- PI Funds Center: The PI Funds Center number.
- Cost Center: The Cost Center number.

### **My Unit's Applications Screen**

After reviewing/approving MRA applications, Business officers and Unit Heads can view the list of MRAs in the My Unit's Applications Screen.

You can access the screen from My Research  $\rightarrow$  Applications & Agreements  $\rightarrow$  Funding Applications  $\rightarrow$  My Unit's Applications.



Last Re	vised: May 1	L1 <sup>th</sup> ,	, 2022									You may ad additional from the "F	filters
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	🔥 Please enter data	for one o	of the filters to see the	applicatio	ns							×	
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	My Applications								Enter Title or	Sponsor or P	Q 1	= 🛞 🕼	
	AR Num/Title		RIS #		Sponsor/Program		Status	Approvers	Status Date	PI Submit Date	PI Name	Student Name	
						No App	lications found						

You can search/filter your list of applications using the Filter Bar at the top of the search list.

- 1. Default Search Parameters:
  - **AR Number** (unique application identifier in MRA)
  - PI Name (your name or a Co-Investigator/Collaborator's name)
  - RIS Application # (unique record identifier in the Research Information System)
  - Student Name (if the MRA was for a studentship/fellowship)
  - Submit Date (date on which you submitted the MRA; you can select a specific date or range)
  - Title (title of the research project)

You may add additional filter fields from the "Filters" button on the top right side of the page

- Creation Date (date on which you created the MRA)
- Status (current status of the application, e.g., Submitted by PI; Approved by Uni Submitted to Sponsor, etc.)
- 2. To set the search parameters for each field click the double box in the text field.
  - a. The operator between search parameters is "and".
- Once you set your search parameters and type your search terms into the field(s), click enter/return on your keyboard or click the blue Go button on the top right side of the page.

Note that you can hide or display the Filter Bar by clicking on the **Hide Filter Bar** (if displayed) or **Show Filter Bar** (if hidden) buttons, respectively.

The full application may be accessed by clicking on the AR Num (blue hyperlink) in the row displaying the record information. Clicking anywhere else in the row will display a pop-out summary of the application on the right side of the screen.

You may sort and configure your applications list by clicking on the buttons described below.

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- 1. The **Sort** button allows you to sort through your applications in the ascending or descending order of Application Number, Submit Date, or Status Date
- 2. The **Group** button allows you to group your applications in the ascending or descending order of Status.
- 3. The **Personalisation** button allows you to select which columns you want to view or hide in the list.
- 4. The **Export to Excel** button will download all applications to a Microsoft Excel file.

### **Allowing Pop-ups on Browsers**

To view the Review, Allocation Summary, and Application List screens, pop-ups must be enabled on your browser. This can be done from your browser settings. Below are instructions on how to allow pop-ups in Chrome, Firefox, and Safari.

- <u>Chrome</u>
- <u>Firefox</u>
- <u>Safari</u>
- Microsoft Edge

### Contacts

For technical questions on MRA, please contact the RAISE Help Desk.

The Help Desk will be staffed from 9:00 a.m. to 5:00 p.m. Monday to Friday.

Phone: 416 946-5000

Email: raise@utoronto.ca