

# **CURESEARCH USER 202**

## **APPROVAL FORM (ALL TABS)**

<https://research.carleton.ca/research-support/carletons-research-support-network/curesearch/>

# Approval Form Function

Why does the Approval Form exist?

A cuResearch Approval Form captures critical elements of a research project, ensuring your Chair/Director and Associate Dean of Research are aware of the application/activities and approve of institutional commitments described therein. The form submission triggers the creation of a unique file in cuResearch from which the [Office of the Vice-President \(Research, Innovation and International\)](#) and [Research Financial Services](#) (RFS) can support the administration of your project.

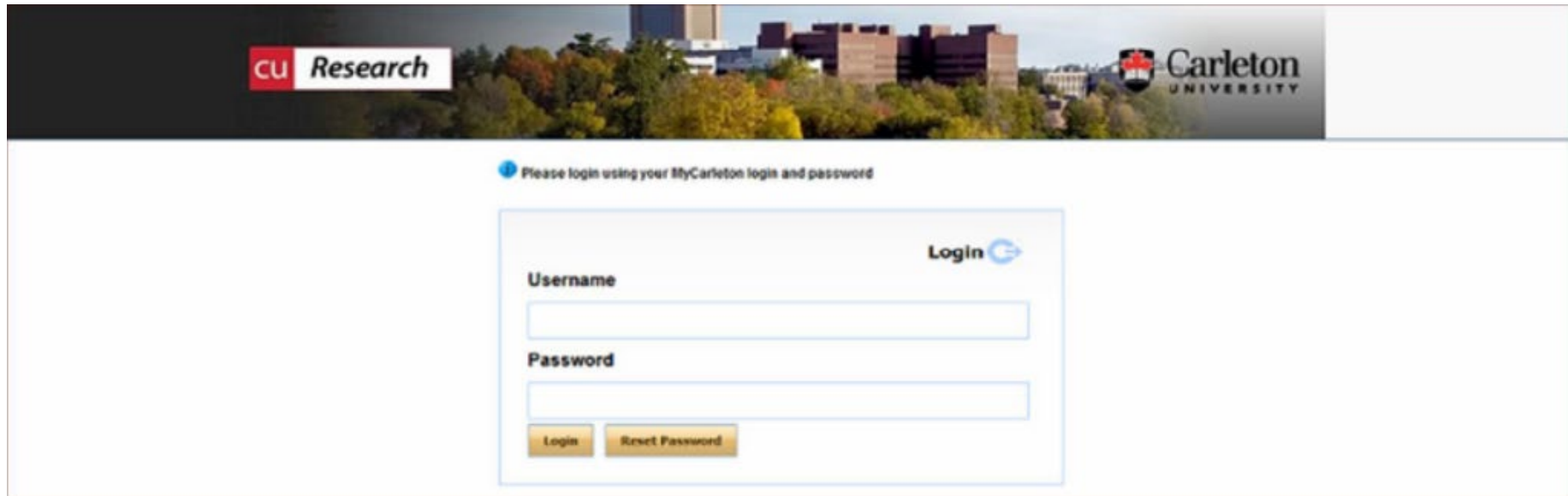
For example, once an agreement/contract is signed, and any required compliances are obtained, a message is issued from this file to alert RFS to open a research fund for a grant/contract.

# When to complete an Approval Form?

- Complete an approval form when you are:
- Applying to an external organization for funding, i.e., your application contains a budget
- Applying for an internal research funding program administered by OVPRI
- Submitting a nomination to an external agency for an honour or distinction
- Requiring institutional signatures on letters of support or applications to an external sponsor
- Responding to a request for a proposal
- Entering into contractual arrangements with another party, including:
  - Research contracts
  - Research grant agreements (for leverage in industry-government projects)
  - Service agreements
  - Memorandums of Understanding (MOU)
  - Purchase orders (for funds coming into Carleton)
  - Intellectual Property agreements
  - Licensing agreements
  - Supervising a student or postdoctoral fellow who has been awarded funding from an external agency, such as Mitacs (excluding scholarships); the student's project must be submitted (and an account will be opened) under the supervisor's name

# Approval Form: Create and Submit

[Login](#) to CUResearch (using MC1 credentials)



The screenshot shows the CUResearch login interface. At the top, there is a banner with the 'CU Research' logo on the left and the Carleton University crest and name on the right. Below the banner, a message reads: 'Please login using your MyCarleton login and password'. The main login area contains a 'Username' field, a 'Password' field, and a 'Login' button with a blue arrow icon. Below the password field are two smaller buttons: 'Login' and 'Reset Password'.

CU Research

Carleton UNIVERSITY

Please login using your MyCarleton login and password

Login

Username

Password

Login Reset Password

# Step 1: Create New Approval Form

Select "Apply New"



# Step 2: Create New Approval Form

Click "Approval Form" hyperlink

## New Application Forms

### A. Research Funding

Application Name	Description	Status
<a href="#">Approval Form</a>	This application replaces the old PDF "checklist". Carleton requires Authorization for all research funding administered through CORIS.	Open

### B. Animal Care

Application Name	Description	Status
<a href="#">Approval "in principle" request to the Animal Care Committee</a>	This application is used to submit a request for a release of funds prior to submitting a full application to the ACC.	Open
<a href="#">Lab or Wildlife Protocol</a>	Complete the Word protocol form found at <a href="http://carleton.ca/curo/ethics-and-compliance/animal-care/animal-research-resources/">http://carleton.ca/curo/ethics-and-compliance/animal-care/animal-research-resources/</a> , and attach and submit through cuResearch. PLEASE NOTE that Safari Internet browser is not supported.	Open

**TIP! SAVE OFTEN !!!!!**

# Step 3: Project Data Entry in Tabs

## TAB 1 – “Project Info”

Application Ref No: 41027 Project Title:

Project Work Flow State: Pre-Submission

\* Project Info Project Team Info Project Sponsor Info \* Approval Form Attachments Approvals Logs Errors

Title \*:

Start Date:

End Date:

Keywords:

### Related Certifications

- Click Search to attach an existing certification
- Click Add New to attach a certification not yet submitted to a review committee

Add New Search			
		Certification Category	Status
No records to display.			

Title: Project Title

Start Date: anticipated project start date

End Date: anticipated project end date

Keywords: words best describing project

Related Certifications:

Link an existing CUREB, ACC & BIO certifications by clicking “Search” OR

Submit one for review by clicking “Add New”

\*= Mandatory Fields (i.e.)

# TAB 2: "Team Info"

The Principal Investigator info is automatically filled out with the user's information.

Cross-appointed researchers must select relevant affiliation

The screenshot shows the 'Project Team Info' tab in a web application. The 'Principal Investigator' section is highlighted with a red box. It contains a 'Change PI' button, a 'Refresh' button, and fields for 'Prefix', 'Last Name' (Sokoloski), and 'First Name' (Richard). Below these are fields for 'Affiliation' (Carleton Office for Research and Initiatives Services), 'Rank' (Other), and 'Institution' (Carleton University). At the bottom are 'Phone1' and 'Phone2' fields.

Carleton Faculty Team Members must be added

Click "Add New"  
Click "Search Profiles"  
Select individual  
Indicate "Role in Project"

The screenshot shows the 'Other Project Member Info' section with an 'Add New' button. Below it is the 'Project Team Member Info' section, which is highlighted with a red box. It contains a 'Search Profiles' button, a 'Refresh' button, and fields for 'Prefix', 'Last Name', 'First Name', 'Affiliation', 'Role in Project' (ACVS Staff), 'Rank', 'Country', and 'Institution'.



# TAB 3: "Project Sponsor Info"

Click "Add New" to add funder or "Party" to Agreement + Program and per fiscal year budget

\* Project Info   Project Team Info   **Project Sponsor Info**   \* Approval Form   Attachments   Approvals   Logs   Errors

Click Add New to add funder and per fiscal year budget details for this project.

**Add New**

Investigator	Agency	Program
No records to display.		

Pop Up Window Appears

- Click "Agency"
- Pop UP Window Appears
- Search funder or "Party" to Agreement by name/abbreviation
- Click "Select"
- Agency is not there? Select "None" and enter agency name in "Comments"

**Save** **Close**

IMPORTANT: All required fields must be completed to save and close the Sponsor Information: Agency, Program, Start Date, End Date, Currency Type, and Comments.

**Sponsor Info.**

**Agency:** Natural Sciences and Engineering Research Council **Agency**

**Program:** Idea to Innovation (I2I) Pr

**Investigator:**

**Competition Date:** 2026/01/07

**Start Date:** 2026/04/01

**End Date:** 2027/03/31

**Currency Type:** CAD

**Comments:**

**GENERATE**

To generate the disbursement table, enter start and end Dates above and click GENERATE. To add or delete fiscal year rows after first generate, edit Start Date and End Date above, and click Generate to refresh the per fiscal year disbursement table. Enter \$0 if no funding is requested. Ex. Royal Society of Canada Fellowship nomination, Non-Disclosure Agreement, Memorandum of Understanding, etc.

At least one disbursement record is required. click GENERATE to refresh the per fiscal year disbursement table.

Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead	Awarded Cash	Awarded In-Kind	Awarded Overhead
2027	2026/04/01	2027/03/31	125,000.00	0.00	0.00	0.00	0.00	0.00
			125,000.00	0.00	0.00	0.00	0.00	0.00

**Save** **Close**

- Select "Program" in drop down
- Program not there?
- Select one and correct in "Comments" box

Select "CAD" -all Amounts must be in CAD

Click "Generate"; Enter cash, in-kind, overhead amounts. IF THERE ARE NO VALUES, ENTER \$0

# Watch for the Required information prompts after Saving **AND BEFORE CLOSING!!**

## Partially entered information will not be saved

IMPORTANT: **All required fields must be completed to save and close** the Sponsor Information: Agency, Program, Start Date, End Date, Generate. Partially entered information will not be saved if the window is closed.

### Sponsor Info.

Agency:	<input type="button" value="Agency"/>	Agency is Required.
Program:	<input type="text"/>	Program is Required.
Investigator:	<input type="text" value="Dr. Stephen Fai (Primary Investigator)"/>	
Competition Date:	<input type="text"/>	
Start Date:	<input type="text"/>	Start date is Required.
End Date:	<input type="text"/>	End date is Required.
Currency Type:	<input type="text" value="CAD"/>	
Comments:	<input type="text"/>	

To generate the disbursement table, enter start and end Dates above and click GENERATE. To add or delete fiscal year rows after first generate, edit Start Date and End Date above, and click Generate to refresh the per fiscal year disbursement table. Enter \$0 if no funding is requested. Ex. Royal Society of Canada Fellowship nomination, Non-Disclosure Agreement, Memorandum of Understanding, etc.

At least one disbursement record is required. click GENERATE to refresh the per fiscal year disbursement table.

Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead	Awarded Cash	Awarded In-Kind	Awarded Overhead
No records to display.								

**Project Info** | Project Team Info | Project Sponsor Info | **Approval Form** | Attachments | Approvals | Logs

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**Regulatory Compliance** | Space and Budget | Research Security

Please read the questions below, and answer them accordingly.

**1.1) \*** If this project is associated with a Carleton Research Centre, please select it from the drop-down menu. If not, please select N/A.  
Please select the relevant research centre from the drop down menu provided.

N/A

**1.2) \*** Could this project require security clearance?  
For more information, please see: <https://www.tpsgc-pwgsc.gc.ca/esco-sro/introduction-eng.html>

☐ Yes  
☒ No

**1.3) \*** Does your project include research involving human participants requiring REB review?  
For more information on ethics regarding research with humans, please see: <https://carleton.ca/researchethics/>

☐ Yes  
☒ No

**1.4) \*** Could your project involve animal subjects requiring Animal Care Committee (ACC) clearance?  
Animal Care Committee protocols are only required for vertebrates. For more information about animal care research ethics, please see: <https://carleton.ca/animalethics/animal-ethics/>

☐ Yes  
☒ No

**1.5) \*** Could your project involve biohazardous materials?  
Biohazardous materials are considered to be any organism or its toxic metabolites believed to be potentially harmful to humans, animals or plants (e.g., viruses, bacteria, fungi, and parasites). For more information on the subject, please see: <https://carleton.ca/animalethics/biohazards/>

☐ Yes  
☒ No

**1.6) \*** Could this project require the use of lasers, X-Rays, radioisotopes or devices with radioactive sources?  
Carleton University's radioisotope activities are regulated and licensed by the Canadian Nuclear Safety Commission (CNSC). The CNSC requires radioisotope workers have training in basic radiation safety and the regulatory conditions. Please see: <https://carleton.ca/ehs/programs/working-lab/radiation-safety>

☐ Yes  
☒ No

**1.7) \*** Could any phase of your project have environmental implications (e.g. take place outdoors)?  
For more information about environmental regulations, please see: [http://www.nserc-crnsng.gc.ca/NSERC-CRNSNG/policies-politiques/environassess-environval\\_eng.asp](http://www.nserc-crnsng.gc.ca/NSERC-CRNSNG/policies-politiques/environassess-environval_eng.asp) AND/OR <http://laws-lois.justice.gc.ca/eng/acts/C-15.2/index.html>

☐ Yes  
☒ No

Please answer the following questions.

For more information on Research Security please click [HERE](#).

**3.1) \*** Does the proposal involve work advancing a Sensitive Technology Research Area, as outlined by the Government of Canada's Policy on Sensitive Technology Research and Affiliations of Concern? (For more information on the advanced and emerging technologies identified within the Government of Canada's list of Sensitive Technology Research Areas, click [HERE](#).)

☐ Yes  
☒ No

**3.2) \*** Are any of the team members involved in the proposal affiliated with, or receiving funding or in-kind support from a university, research institution or laboratory on the Named Research Organizations (NROs)? (For more information on the Named Research Organization identified by the Government of Canada for their connection to military, national defence, or state security entities that could pose a risk to Canada's national security, click [HERE](#).)

☐ Yes  
☒ No

**Regulatory Compliance** | **Space and Budget** | Research Security

Please fill in the questions below regarding your project space requirements and budget details. In addition, you will need to attach your funding application to the "Attachments" tab.

**2.1) \*** Does your project require newly constructed space commitments or renovations? If yes, please ensure you have confirmation of approval from your Associate Dean, Research.

☐ Yes  
☒ No

**2.2) \*** Have you, or any faculty member(s) on this project team requested release time for this project?

☐ Yes  
☒ No

**2.3) \*** Are you, or any other faculty member(s) on this project team, receiving principal investigator fees from this project?

☐ Yes  
☒ No

**2.4) \*** Is Carleton University expected to provide any other financial commitment for this project?  
Other financial commitment refers to any cash or in kind contributions that have NOT been reported in your budget. Other financial commitment does NOT refer to your Carleton University annual salary.

☐ Yes  
☒ No

# Tab 5- Attachments

Click "Add Attachment" to upload relevant document(s) (e.g., Research Proposal/nomination, Agreement (Subcontract, NDA, Material Transfer, etc.)

Note: Maximum per file size is 10MB.  
File type: Most types supported (i.e. pdf, docx, XLS, JPEG, etc.)

Pop Up Window Appears

Briefly describe attachment, e.g. NDA (CU-Shopify), SSHRG PEG Proposal, RSC College Nomination

Include version date (if relevant)

Select from drop downtype that best describes your document (if relevant)

TO SAVE and ATTACH CLIK "ADD ATTACHMENT"

Project Info Project Team Info Project Sponsor Info \* Approval Form Attachments Approvals Logs Errors

Please attach any of the following information you find relevant to your application (e.g., your most recent application, budget, and/or CV) for Chair/Associate Dean (Research) approval.

**Add Attachment**

NOTE: The maximum individual attachment size is 10MB. All attachments larger than 10MB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than 10MB.

**Add Attachment**

Description:

Upload Attachment:  **Browse**

Allowed File Types:  
.jpeg, .jpg, .png, .doc, .docx, .xls, .xlsx, .txt, .pdf, .ppt, .pptx, .pps, .ppsx

Allowed File Size: 10 MB

Version Date:

Doc Agreement: **--Select One--**

**Add Attachment** **Cancel**

Click  
Browse  
to select  
file

# TAB 6- Log

Application Workflow actions are time stamped.  
View as Application workflow  
Or  
Application Log

Project Info	Project Team Info	Project Sponsor Info	Approval Form	Attachments	Approvals	Logs
<input checked="" type="radio"/> Application Workflow Log <input type="radio"/> Application Log						
Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group	
2025/12/18 14:46	New File Submitted By Researcher Project Work Flow State has been changed from Faculty Signing Authority Review to ORS Review	Faculty Signing Authority Review -> ORS Review	[Action: Approve]	Audrey Girouard	Faculty Signing Authority	
2025/12/18 13:01	Project Work Flow State has been changed from Department Signing Authority Review to Faculty Signing Authority Review	Department Signing Authority Review -> Faculty Signing Authority Review	[Action: Approve]	Yasser H.A. Hassan	Department Signing Authority	
2025/12/18 11:20	Project Work Flow State has been changed from Pre-Submission to Department Signing Authority Review	Pre-Submission -> Department Signing Authority Review	I am working with IPS on finalization of NSERC Alliance	Road Runner	Principal Investigator	

Project Info	Project Team Info	Project Sponsor Info	Approval Form	Attachments	Approvals	Logs
<input type="radio"/> Application Workflow Log <input checked="" type="radio"/> Application Log						
Timestamp	Log Activity	User				
2025/12/18 14:46	Project Work Flow State has been changed from Faculty Signing Authority Review to ORS Review	Audrey Girouard				
2025/12/18 13:01	Project Work Flow State has been changed from Department Signing Authority Review to Faculty Signing Authority Review	Yasser H.A. Hassan				
2025/12/18 11:20	Project Work Flow State has been changed from Pre-Submission to Department Signing Authority Review	Road Runner				

# Tab 7- ERRORS

* Project Info	Project Team Info	Project Sponsor Info	* Approval Form	Attachments	Approvals	Logs	Errors
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**Project Info** -> Project Title is required.

**Approval Form** -> Regulatory Compliance Checklist: 1.1 If this project is associated with a Carleton University Research Centre, please select it from the dropdown menu.

Indicates missing mandatory  
information by field.

Review to add information

A vertical bar on the left side of the slide with a gradient from orange at the top to blue at the bottom.

# NEED HELP?

## CONTACT

[curesearch@carleton.ca](mailto:curesearch@carleton.ca)