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CANADA FOUNDATION FOR INNOVATION | FONDATION CANADIENNE POUR L'INNOVATION

Changes to the CFI post-award online environment

Webinar presented in November 2014

Research builds communities
La recherche au service des collectivités

Agenda

- **Chapter 1**
  Why transition to CAMS?
- **Chapter 2**
  New features in CAMS
- **Chapter 3**
  Improvements to online forms
- **Chapter 4**
  Transition – December 2014
- **Chapter 5**
  Questions and discussion

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Chapter 1

Why transition to CAMS?

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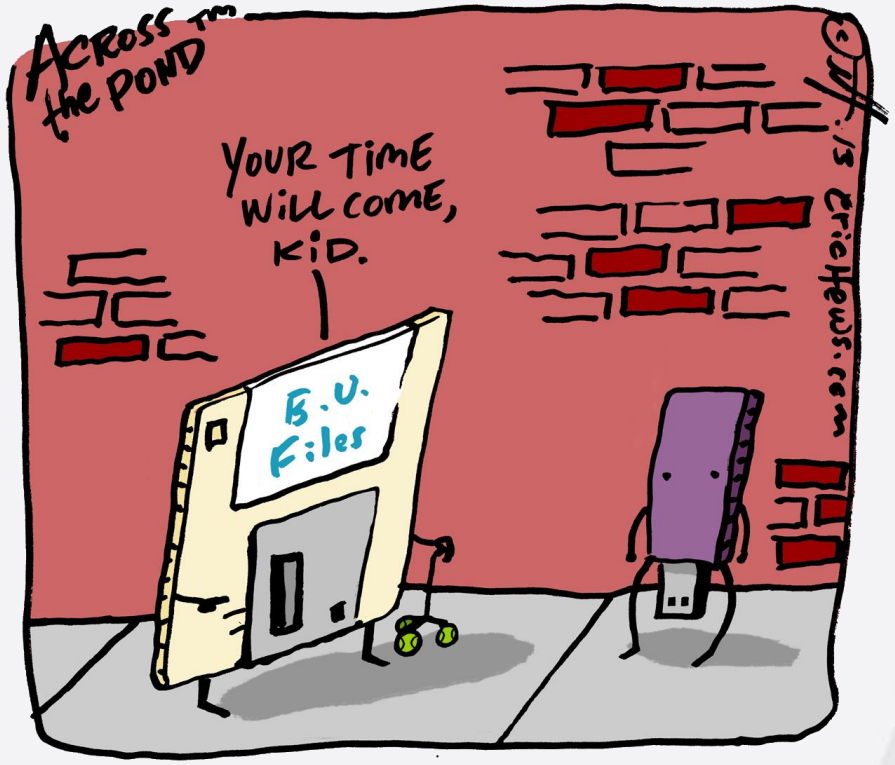
Why transition to CAMS?

Technological obsolescence

Limited features and design



Why Transition to CAMS?

System enhancements, new features
and improved functionalities

Assist institutions in management
of CFI-funded projects

Chapter 2

New features in CAMS

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New features in CAMS

- Improved navigation
- Enhanced search features
- Tailored access privileges
- Overview functionalities
- Online certification
- Newly available information

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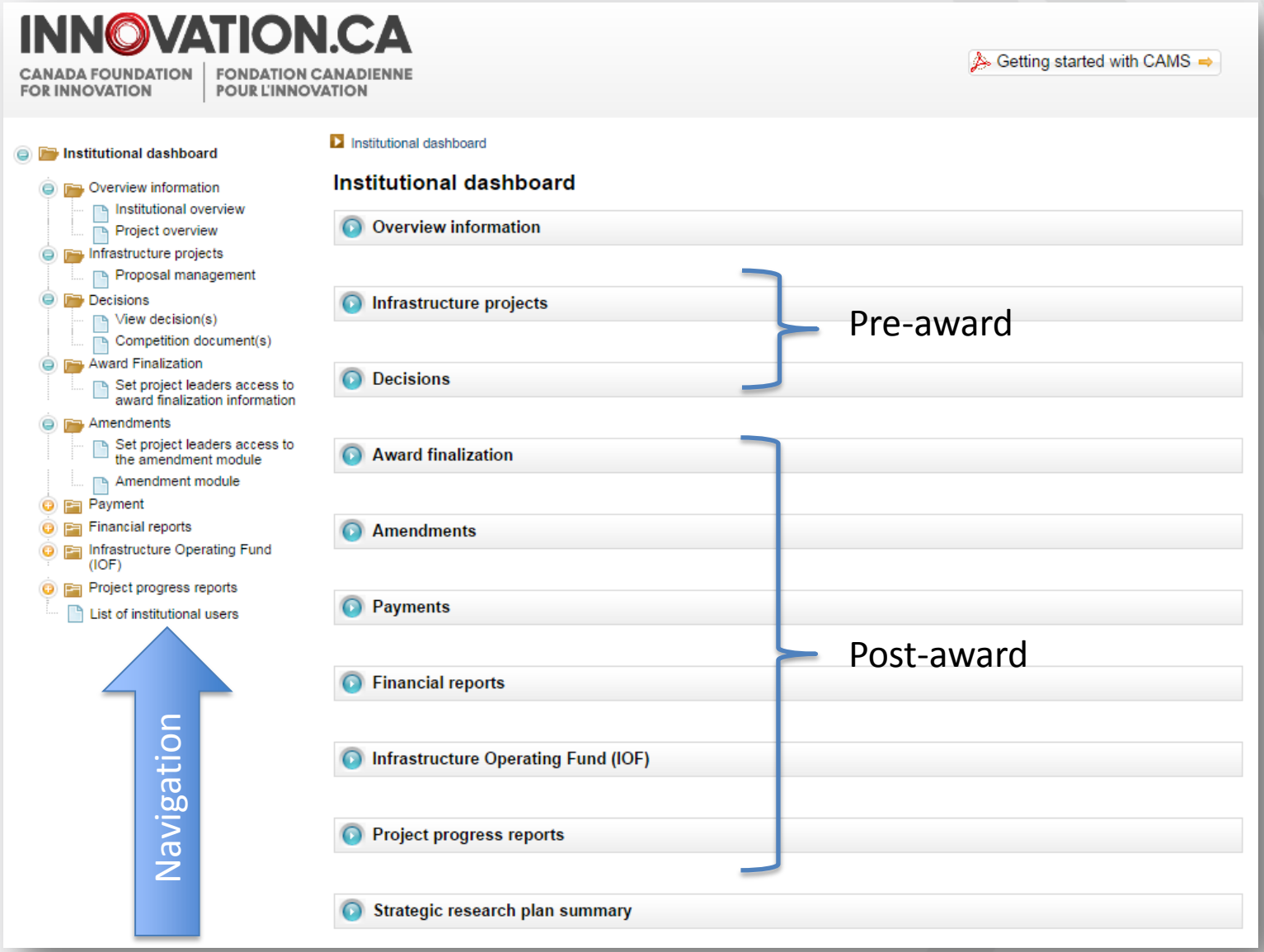
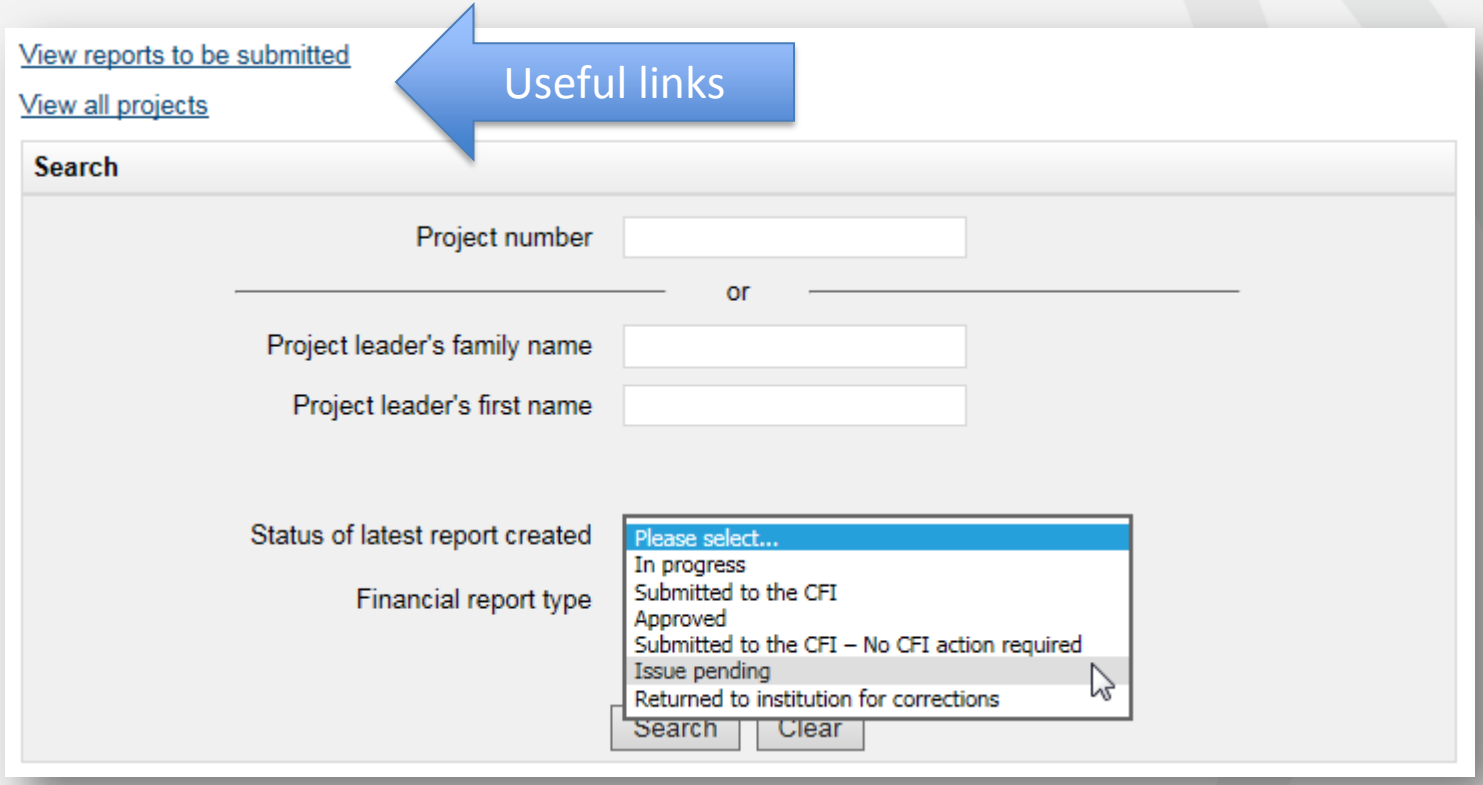
Improved navigation



Enhanced search features

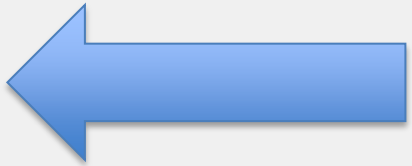


Enhanced search features

Search results

Financial report details, including PDFs and status information can be viewed by clicking on the related project number link within the search results table.

Export search results to Excel



Show all Show pages

24 entry(ies) found displaying 20 entry(ies)

1 2

Project number	Project leader	Project title	Fund	Next report due		Approved project end date	Reporting frequency
				Reporting period end date	Date report was created		
24680	Doe, Jane	Sound quality lab	New Initiatives Fund 2009	2015-03-31		2013-12-31	Annual

Enhanced search features

Search results

Financial report details, including PDFs and status information can be viewed by clicking on the related project number link within the search results table.

Export search results to Excel

Show all / Show pages

2 entry(ies) found

Project number	Project leader	Project title	Fund	Latest financial report created			Final report created?	Approved project end date	Reporting frequency
				Reporting period end date	Status	Submission date			
12345	Account, Demo	Leading-edge infrastructure	Innovation Fund	2014-03-31	Approved	2014-06-25	No	2016-01-01	Annual
67890	Smith, John	Interactive lab	CRC Infrastructure Fund	2010-03-31	Approved	2010-11-30	Yes	2010-03-31	Every two years

2 entry(ies) found

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Tailored access privileges

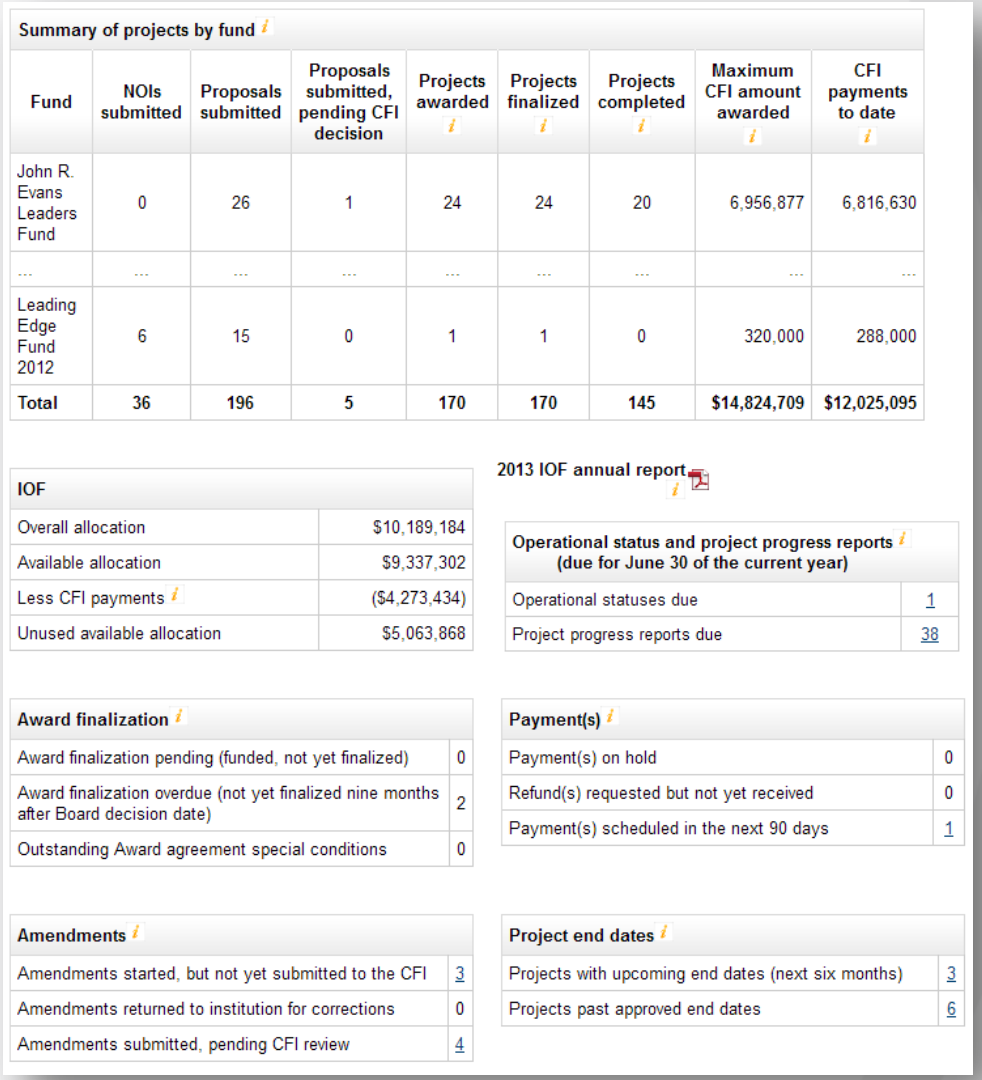
Institutional administrators
Individual-level privileges

Allow **each** institutional administrator to access specific modules

Project leaders
Group-level privileges

Allow **all** project leaders to access specific modules

Overview functionalities institutional level



Summary of projects by fund

Fund	NOIs submitted	Proposals submitted	Proposals submitted, pending CFI decision	Projects awarded	Projects finalized	Projects completed	Maximum CFI amount awarded	CFI payments to date
John R. Evans Leaders Fund	0	26	1	24	24	20	6,956,877	6,816,630
...	...	...	...	...	...	...	...	...
Leading Edge Fund 2012	6	15	0	1	1	0	320,000	288,000
Total	**36**	**196**	**5**	**170**	**170**	**145**	**$14,824,709**	**$12,025,095**

IOF

Overall allocation	$10,189,184
Available allocation	$9,337,302
Less CFI payments	($4,273,434)
Unused available allocation	$5,063,868

2013 IOF annual report

Operational status and project progress reports (due for June 30 of the current year)

Operational statuses due	1
Project progress reports due	38

Award finalization

Award finalization pending (funded, not yet finalized)	0
Award finalization overdue (not yet finalized nine months after Board decision date)	2
Outstanding Award agreement special conditions	0

Payment(s)

Payment(s) on hold	0
Refund(s) requested but not yet received	0
Payment(s) scheduled in the next 90 days	1

Amendments

Amendments started, but not yet submitted to the CFI	3
Amendments returned to institution for corrections	0
Amendments submitted, pending CFI review	4

Project end dates

Projects with upcoming end dates (next six months)	3
Projects past approved end dates	6

Overview functionalities project level

Budget and amendments

	Status	Date submitted	PDF	Change to End date	Change to Infrastructure
Proposal (financial module)		2005-10-28			
Itemized list and summary of secured contributions	Completed	2006-11-16			

Decision

Funding decision	Full funding
Board decision date	2006-03-07
Date decision released to institution	2006-03-09
Date decision released to public	2006-03-28

Award agreement information

Award finalization form received	Not received
Initial award agreement issued	Not issued
Maximum funding percentage	40%

Payments

Next payment (net)	None scheduled	None scheduled
Holdback	($10,548)	
Payment(s) on hold	No	

Expenditures

Eligible costs per award agreement	$264,145

Financial reporting

Reporting frequency	Annual
Next financial report due	2008-03-31
Latest financial report submitted	2007-03-31
Final financial report submitted	Yes

Project progress reporting

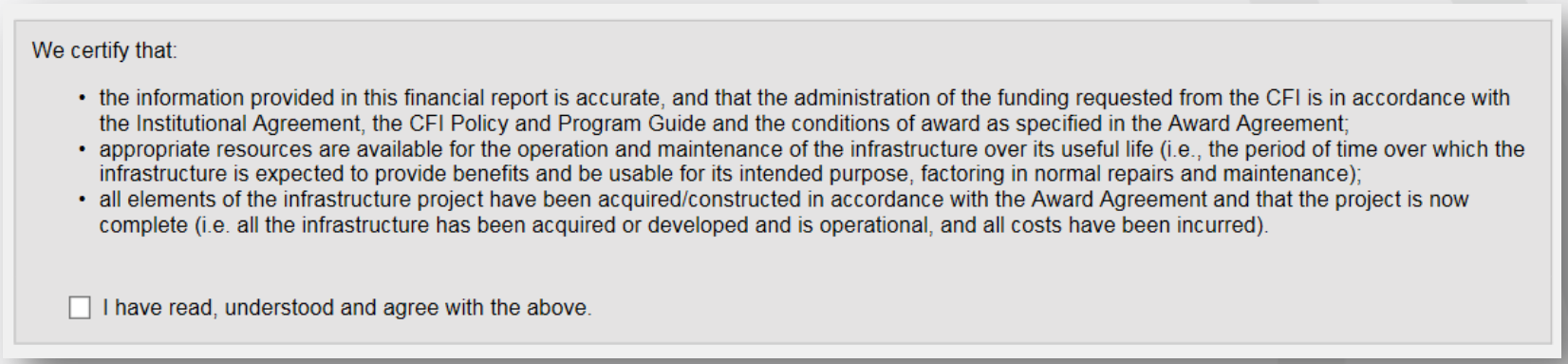
Operational status	Operational

Project progress reporting schedule

2007	Submitted to CFI	View
2008	Submitted to CFI	View
2009	Submitted to CFI	View
2010	Submitted to CFI	View
2011	Submitted to CFI	View

Online certification

- Final financial reports



We certify that:

- the information provided in this financial report is accurate, and that the administration of the funding requested from the CFI is in accordance with the Institutional Agreement, the CFI Policy and Program Guide and the conditions of award as specified in the Award Agreement;
- appropriate resources are available for the operation and maintenance of the infrastructure over its useful life (i.e., the period of time over which the infrastructure is expected to provide benefits and be usable for its intended purpose, factoring in normal repairs and maintenance);
- all elements of the infrastructure project have been acquired/constructed in accordance with the Award Agreement and that the project is now complete (i.e. all the infrastructure has been acquired or developed and is operational, and all costs have been incurred).

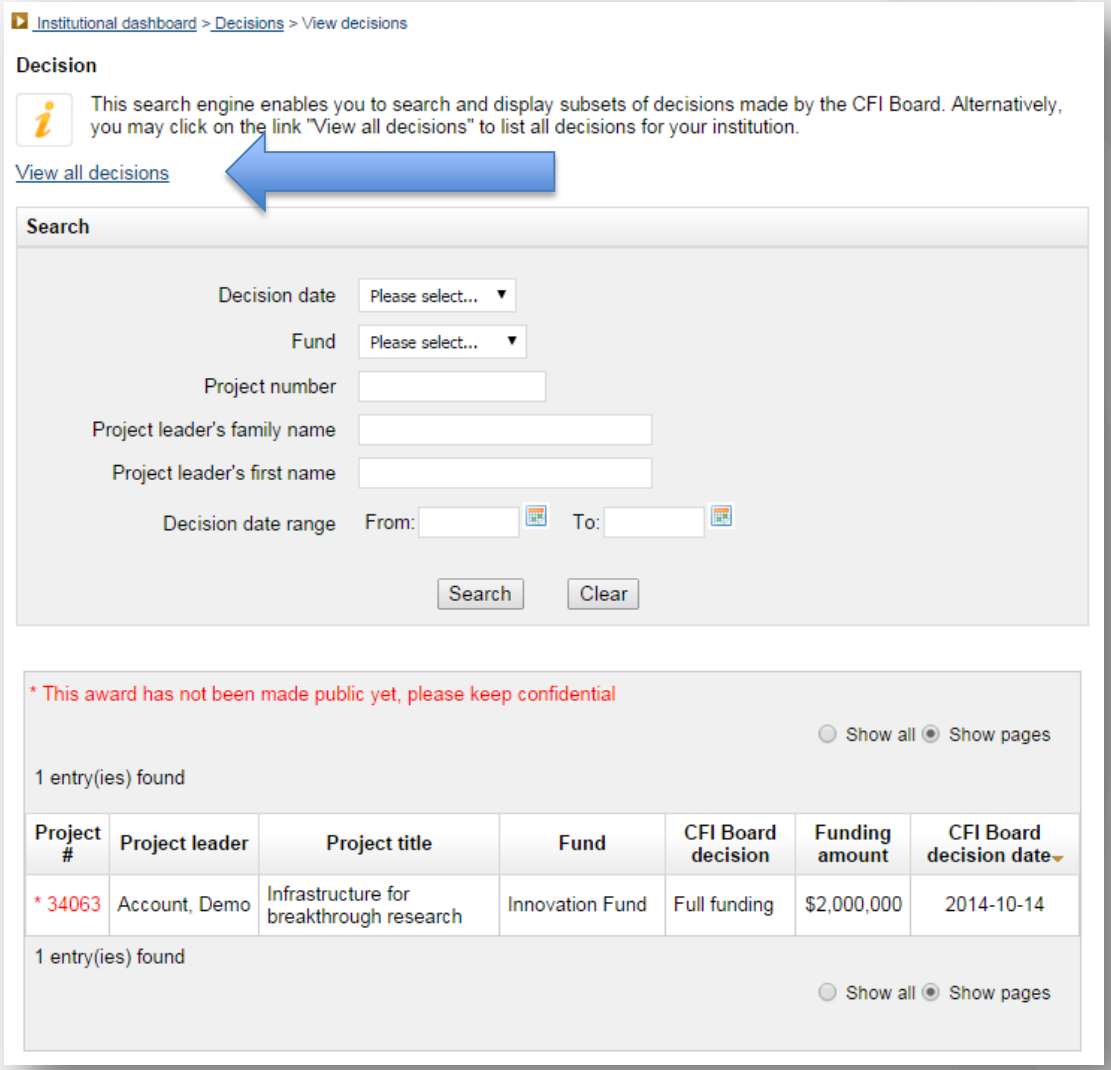
☐ I have read, understood and agree with the above.

- IOF annual reports

Newly available information

- Funding decisions
- Award finalization documents (PDF format)
- Financial reporting frequency, end date and date of next financial report due
- Payment information

Funding decisions – institution



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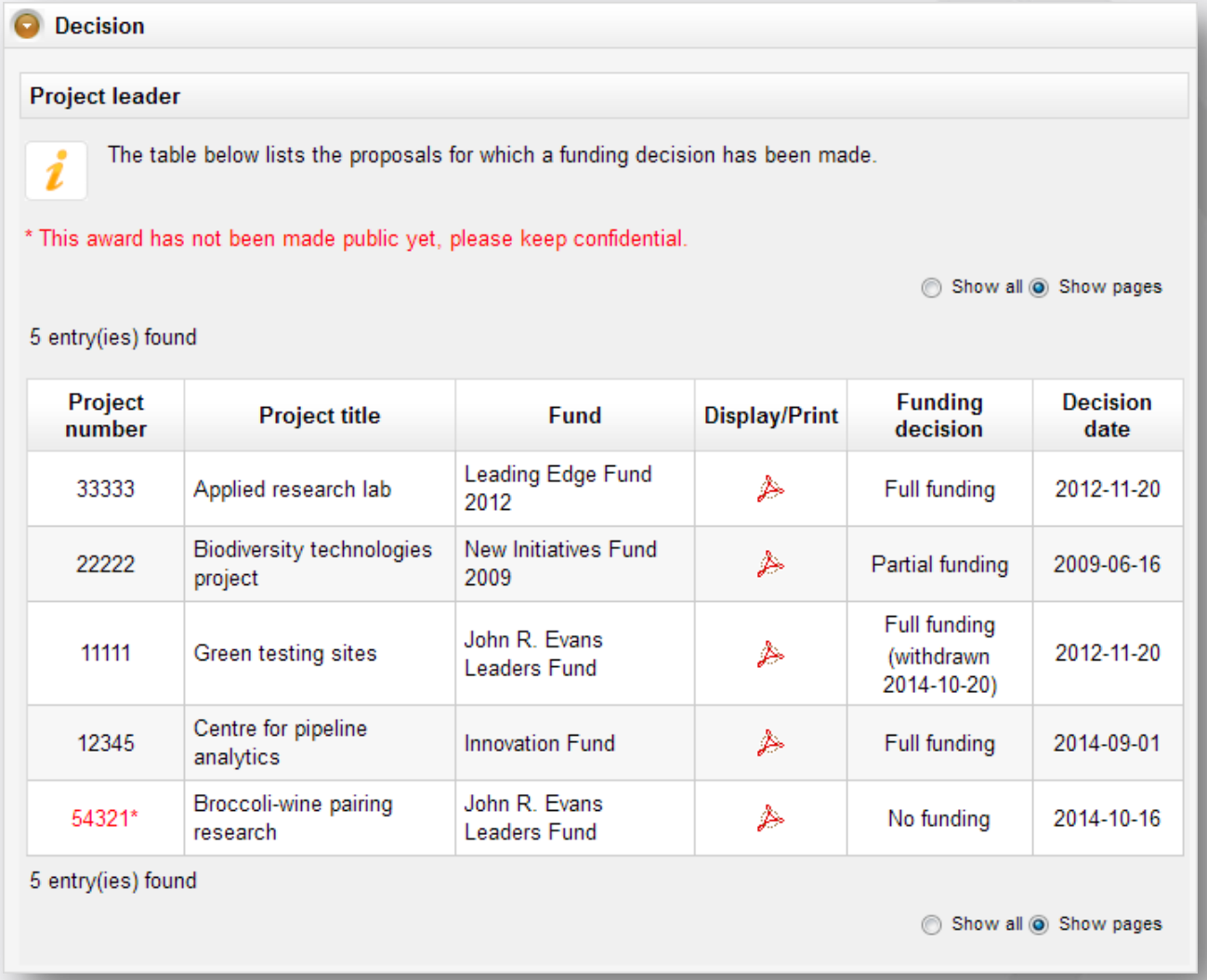
Funding decisions – project leaders



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.

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5 entry(ies) found

Project number	Project title	Fund	Display/Print	Funding decision	Decision date
33333	Applied research lab	Leading Edge Fund 2012		Full funding	2012-11-20
22222	Biodiversity technologies project	New Initiatives Fund 2009		Partial funding	2009-06-16
11111	Green testing sites	John R. Evans Leaders Fund		Full funding (withdrawn 2014-10-20)	2012-11-20
12345	Centre for pipeline analytics	Innovation Fund		Full funding	2014-09-01
54321*	Broccoli-wine pairing research	John R. Evans Leaders Fund		No funding	2014-10-16

5 entry(ies) found

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Payment information – examples

Detailed transactions – month of June 2014

Project number	Payment type	Date	Net amount	Holdback	Gross amount	Payment status	Comments
11111	Holdback	2014-06-27	7,900	(7,900)	0	Paid by CFI	
22222	Holdback	2014-06-20	32,422	(32,422)	0	Paid by CFI	
22222	Residual	2014-06-20		(298)	(298)		View
33333	Regular	2014-06-06	95,277	10,586	105,863	Paid by CFI	
44444	Regular	2014-06-06	108,000	12,000	120,000	Paid by CFI	

Summary level information for a project

Project number	Project leader	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)	
12345	Account, Demo	FL 1 M$-2 M$	800 000	623 443	96 556	0	80 001	0	2016-12-31

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Chapter 3

Improvements to online forms

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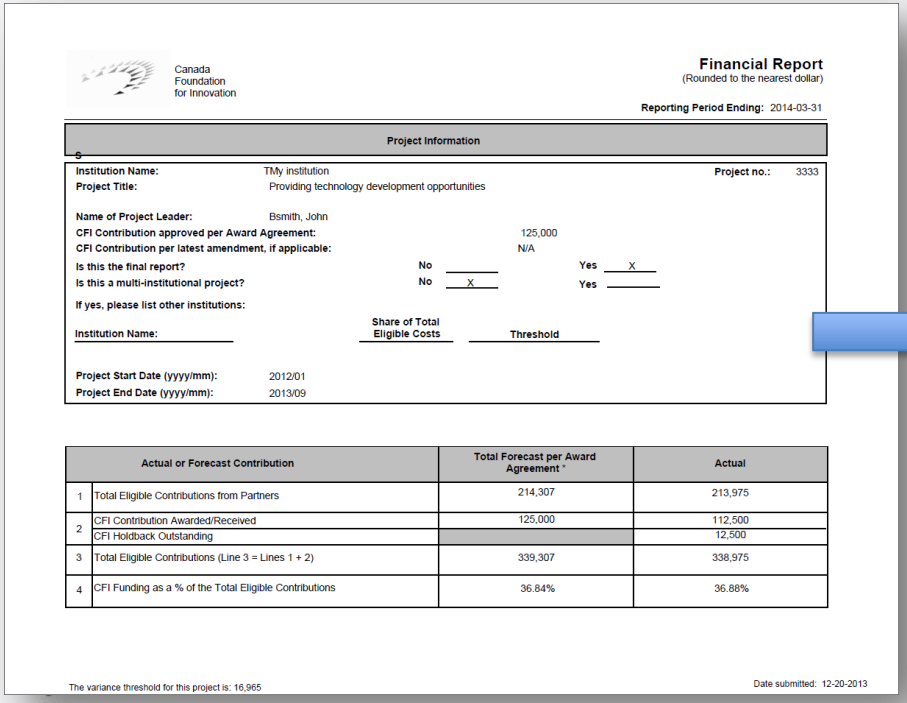
Improvements to online forms

Improvements to online forms

- Different interfaces for data entry
- Content re-ordered, displayed differently, or reformulated (online interface and PDFs)



Canada Foundation for Innovation

Financial Report
(Rounded to the nearest dollar)

Reporting Period Ending: 2014-03-31

Project Information

Institution Name:	TMy institution	**Project no.:**	3333
Project Title:	Providing technology development opportunities		
Name of Project Leader:	Bsmith, John		
CFI Contribution approved per Award Agreement:		125,000	
CFI Contribution per latest amendment, if applicable:		N/A	
Is this the final report?	**No** ____	**Yes** X	
Is this a multi-institutional project?	**No** X	**Yes** ____	

If yes, please list other institutions:

Institution Name:	**Share of Total Eligible Costs**	**Threshold**

Project Start Date (yyyy/mm): 2012/01
Project End Date (yyyy/mm): 2013/09

	Actual or Forecast Contribution	Total Forecast per Award Agreement *	Actual
1	Total Eligible Contributions from Partners	214,307	213,975
2	CFI Contribution Awarded/Received	125,000	112,500
	CFI Holdback Outstanding		12,500
3	Total Eligible Contributions (Line 3 = Lines 1 + 2)	339,307	338,975
4	CFI Funding as a % of the Total Eligible Contributions	36.84%	36.88%

The variance threshold for this project is: 16,965

Date submitted: 12-20-2013

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Project number **222222**
Leaders Opportunity Fund - Partnership - CRC
Final financial report

Overview

Institution	My institution
Project leader	Doe, Jane
Fund	Leaders Opportunity Fund - Funding for infrastructure associated with a Canada Research Chair
Project title	Trend Analysis Laboratory
Attachments	No
Date of award agreement	2013-07-12
Actual project end date	2014-09-04
Multi-institutional project	No

Summary

	Latest approved budget	Actual
Total eligible costs	$257,608	$257,608
Less: contributions from eligible partners	($158,595)	($158,595)
CFI contribution	$99,013	$99,013
Less: CFI payments to date (net of holdback)		($89,013)
Final balance due from/(to) the CFI		$10,000
CFI contribution as a percentage of the total eligible costs	38.44%	38.44%

Certification

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Submitted by

Research builds communities
La recherche au service des collectivités

Printed on 2014-10-23

Improvements to online forms

Minor changes:

- The *Itemized list and summary of secured contributions form* is being discontinued
  - Amendment module must be used in CAMS for budget updates
- Item location needs to be entered in amendment requests and final financial reports
- New feature to send attachments with final financial reports (replaces emails)

Chapter 4

Transition – December 2014

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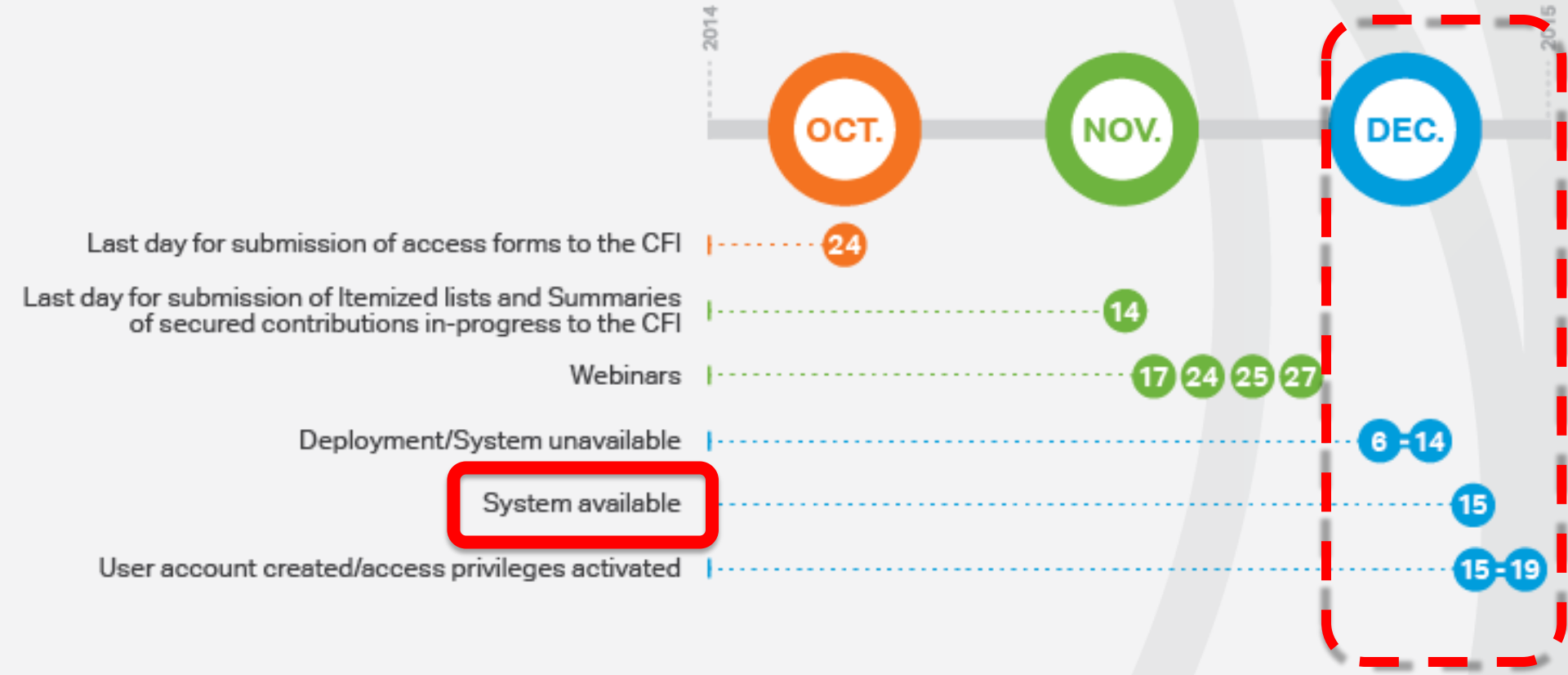
Key dates and activities



Getting ready for the transition

- Forms in progress – what you need to know
- Inform project leaders of transition – elements to communicate:
  - The CFI is making changes to its post-award online environment
  - List the additional information that will be available to them in their portal (refer to the *Project leaders access form* for the access privileges granted by your institution)
  - Dates for system outage (December 6-14, 2014)
  - Provide link to reference document on CFI online page of Innovation.ca: ***Getting started with CAMS: An overview document for researchers***

Review of business processes and practices

Consider opportunities to increase effectiveness and efficiency

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Help us improve CAMS

Chapter 5

Questions and discussion

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

help.aide@innovation.ca

We will be happy to answer you promptly.

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