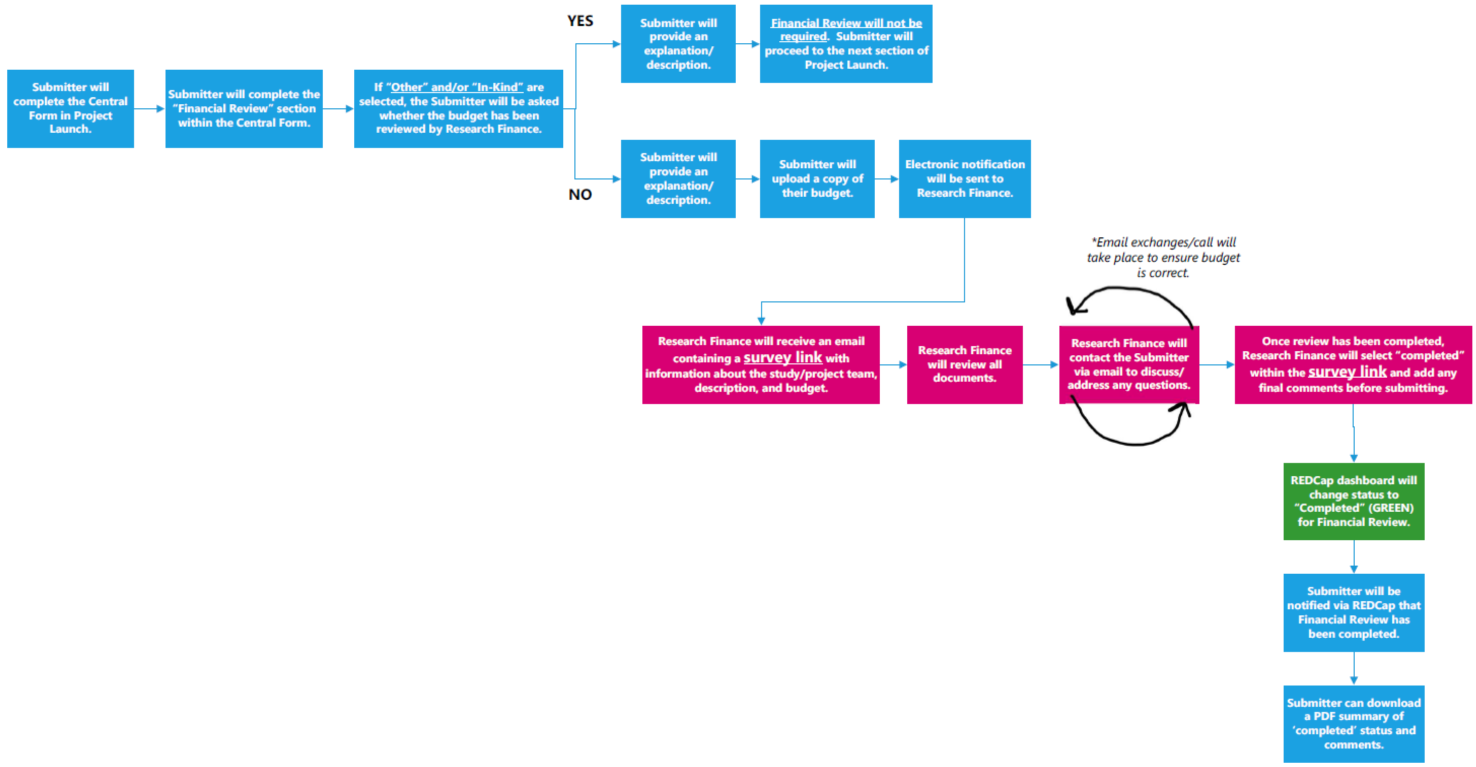
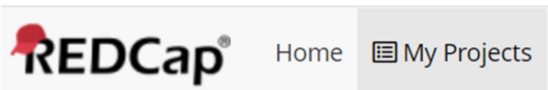
PROJECT LAUNCH: 'Financial Review' Instructions

- Overview of the workflow for the "Submitter":

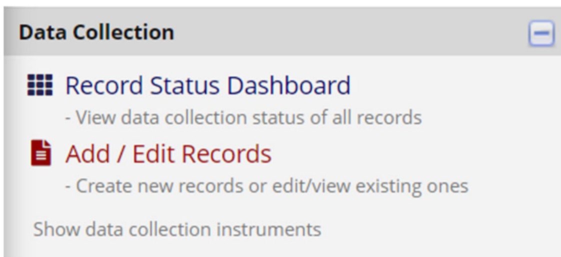


Section A: To be completed by the project/study submitter

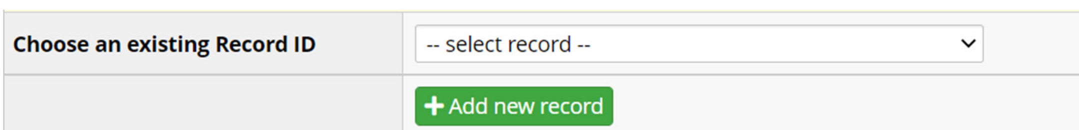
1. Go to MY PROJECTS using the link: https://wcredcap.wchospital.ca/



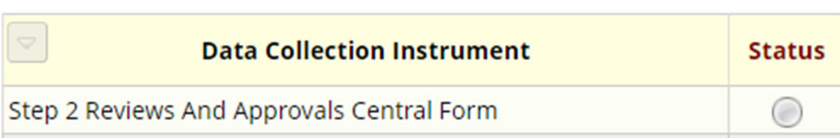
If you have access, you will see “*Project Launch*” in the Project List; contact ProjectLaunch@wchospital.ca if it is not there. Click on the project name and then click on Add/Edit Records (on left-hand panel):



2. Click on ADD NEW RECORD



3. Click on the grey bubble beside the “**Step 2: Reviews and Approvals Central Form**” option

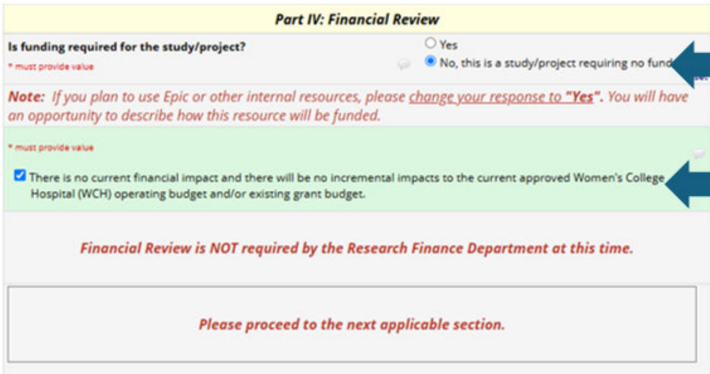


4. Please complete all fields within the Central Form and upload your protocol. Section headings will include:

- *Part I: Training Attestation*
- *Part I: Privacy & Data Security Attestation*
- *Part II: Service Providers’ Impact*
- *Part III (A): Scientific Review*
- *Part III (B): Departmental Feasibility*
- *Part IV: Financial Review*

5. For section "**Part IV: Financial Review**", please indicate whether the study/project is funded or unfunded and follow the prompts. Below you will find some of the scenarios and their branching logic.

Scenario 1: This is a study/project that requires no funds.



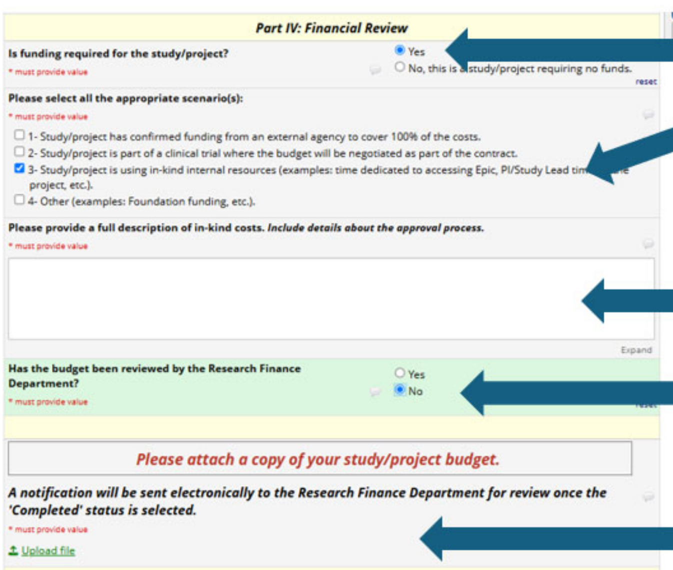
By selecting "No", you need to confirm that there is no current financial impact.

Scenario 2: This is a study/project that requires funds.

Financial Review is NOT required by the Research Finance Dept when "YES" is selected (funded study/project) AND options #1 and/or #2 from the list.

Scenario 3: This is a study/project that requires funds (uses in-kind internal resources).

NOTE: If required, a budget template is available on the Research Finance page within 'forms'.



Please select "YES" (funded study/project) AND option #3 ("in-kind").

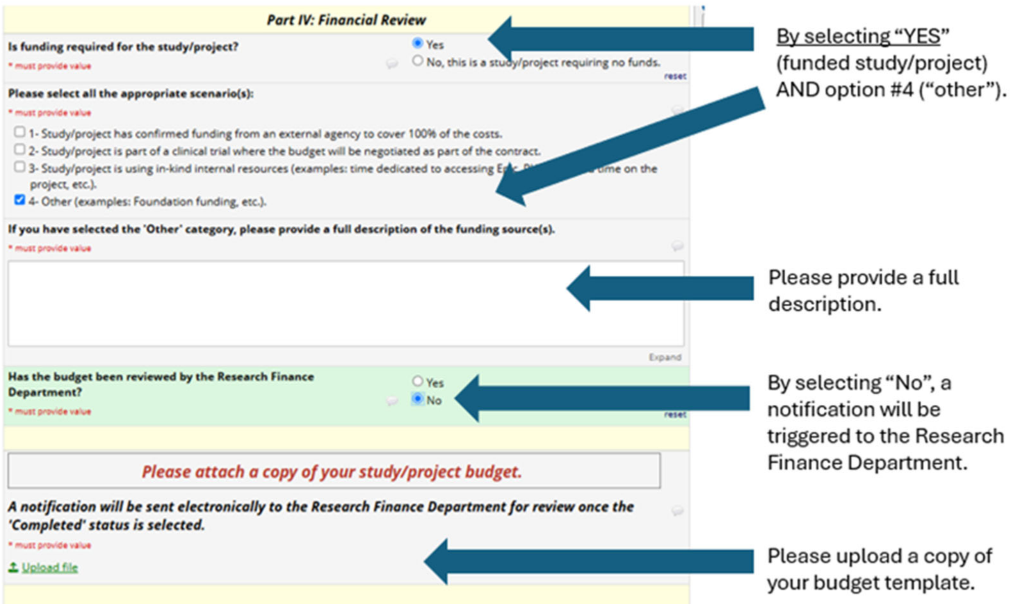
Please include a full description.

By selecting "No", a notification will be triggered to the Research Finance Department.

Please upload a copy of your budget template.

Scenario 4: This is a study/project that requires funds (uses 'other' funding sources).

NOTE: If required, a budget template is available on the Research Finance page within 'forms'.



6. For ALL SCENARIOS, once all relevant sections have been completed, please click '**COMPLETE'** in the Form Status drop down and '**SAVE & EXIT FORM**'.

INFORMATION FOR SCENARIOS #3 AND/OR #4 ONLY:

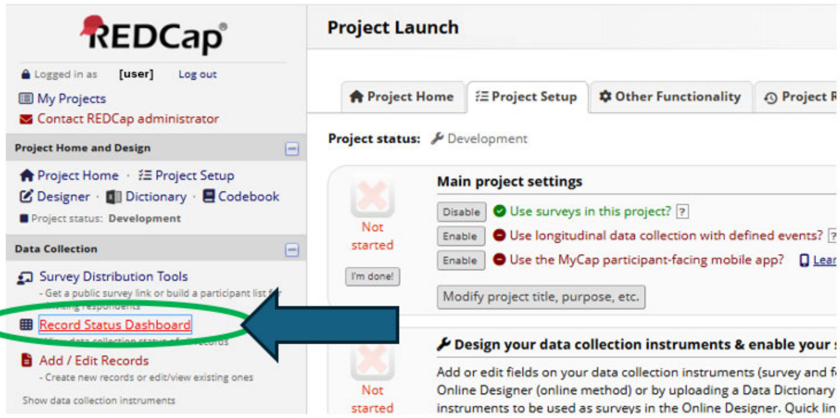
WHERE A FINANCIAL REVIEW WAS NOT ALREADY CONDUCTED, AN ELECTRONIC NOTIFICATION WILL BE SENT TO THE RESEARCH FINANCE DEPARTMENT. THIS NOTIFICATION WILL INCLUDE A COPY OF THE ATTACHED BUDGET.

This notification will trigger email exchanges between the Research Finance Department and the Submitter to ensure that the budget is thoroughly reviewed.

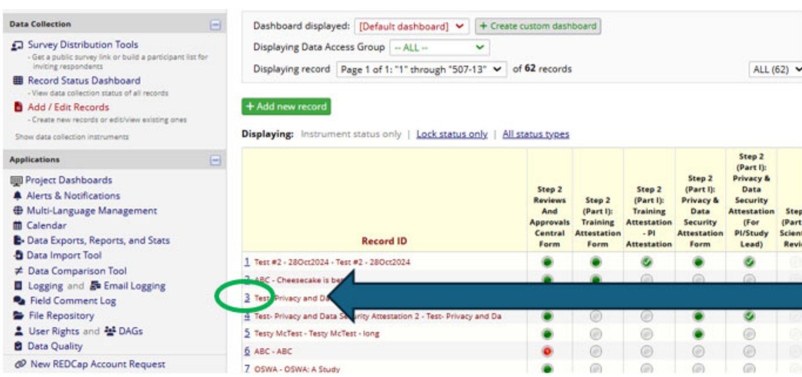
Once the budget has been finalized, the Research Finance Department will change the status (within their survey record) to "completed" and a final electronic notification will be sent to the Submitter regarding this approval.

Section B: Accessing Dashboards (to view status) and Document Download

1. Once logged into REDCap, please go to the Record Status Dashboard to find your study/project. This can be found on the left-hand column (see below).

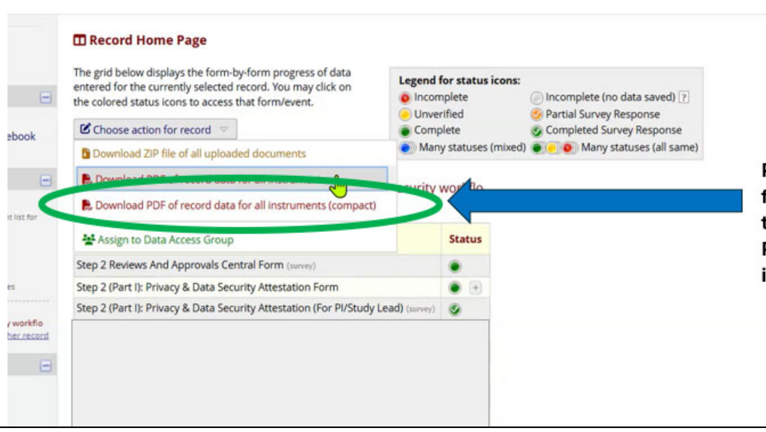


2. Once a full list of projects is populated within the dashboard, please select your project. You will need to click on the hyperlinked Record ID number (see below for example). This action will open the Data Collection Instrument table.



Find your project on the list and click on the hyperlinked number.

3. Above the Data Collection Instrument table, you will notice a field called “Choose action for record” drop-down menu. Please select the “Download PDF of record data for all instruments (compact)” option from the list.



Please select the option for downloading the PDF that states “Download PDF of record data for all instruments (compact)”.