

# **WAYPOINT RESEARCH APPLICATION FORM (WRAF) USER INSTRUCTIONS**

WAYPOINT RESEARCH INSTITUTE  
NOV2023

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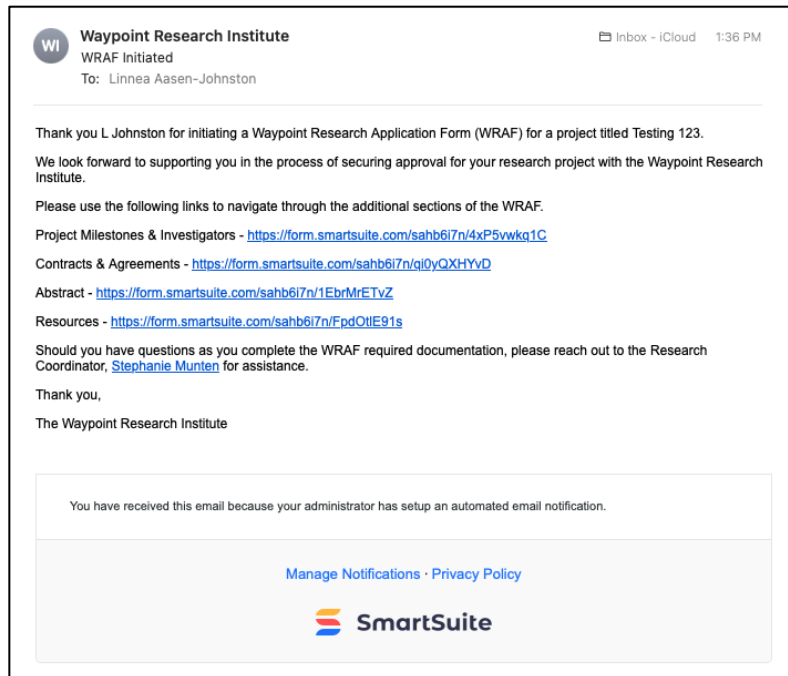
## Waypoint Research Application Form (WRAF)

This form can be found here: <https://form.smartsuite.com/sahb6i7n/si8foEvBND>. To support external or internal WRAFs, this is a publicly available link (i.e., it may be used by non-SmartSuite account holders).

Once you select this link the following form will open on a web browser:

The screenshot shows a web browser window displaying the 'Waypoint Research Institute' logo at the top. Below the logo is the title 'Waypoint Research Approval Form (WRAF) - Project Identifying Information'. A subtitle reads: 'This form is to be completed for all research projects to be conducted at Waypoint Centre for Mental Health Care involving participation by Waypoint patients, clients, and/or staff.' The form is divided into two main sections: 'Identifying Information' and 'Funding Information'. The 'Identifying Information' section contains three input fields: 'Corresponding Researcher Name' (a dropdown menu with 'Select option'), 'Project Title' (a text box with 'Write here'), and 'Project Type' (a dropdown menu with 'Select option'). Below these fields is a question: 'Is this research project being conducted by a student in partial fulfillment of a degree program at any University or College?' with a radio button and the label 'NO'. The 'Funding Information' section contains a question: 'Is this project externally funded?' with a radio button and the label 'NO'. At the bottom of the form is a blue 'Submit' button.

Once this first WRAF sub-form is filled and submitted, the system will send a confirmation email with additional links for the subsequent WRAF sub-forms.



These sub-forms may be completed by you, the original submitter, or may be delegated by forwarding the specific sub-form link to collaborators.

Once the all WRAF sub-forms are filled, the status of your application will show at 100%. At this time the WRAF can be submitted. The system will send one last email with a link to the *Signature and Assurances* sub-form. This is to be completed by the Principal Investigator, signed and submitted. At this point, the WRAF form is complete and the system will route it to the appropriate approvers, based on your project details.

You will receive an email notifying you that the WRAF has been received. At the bottom of the email, you will find a “View Record” button. This will take you directly to your WRAF record in SmartSuite.

**NOTE:** You will need to sign-in to SmartSuite. If you are an external researcher, an account can be created by external users with the same email as used on the WRAF form.

# Overview of WRAF Workflow

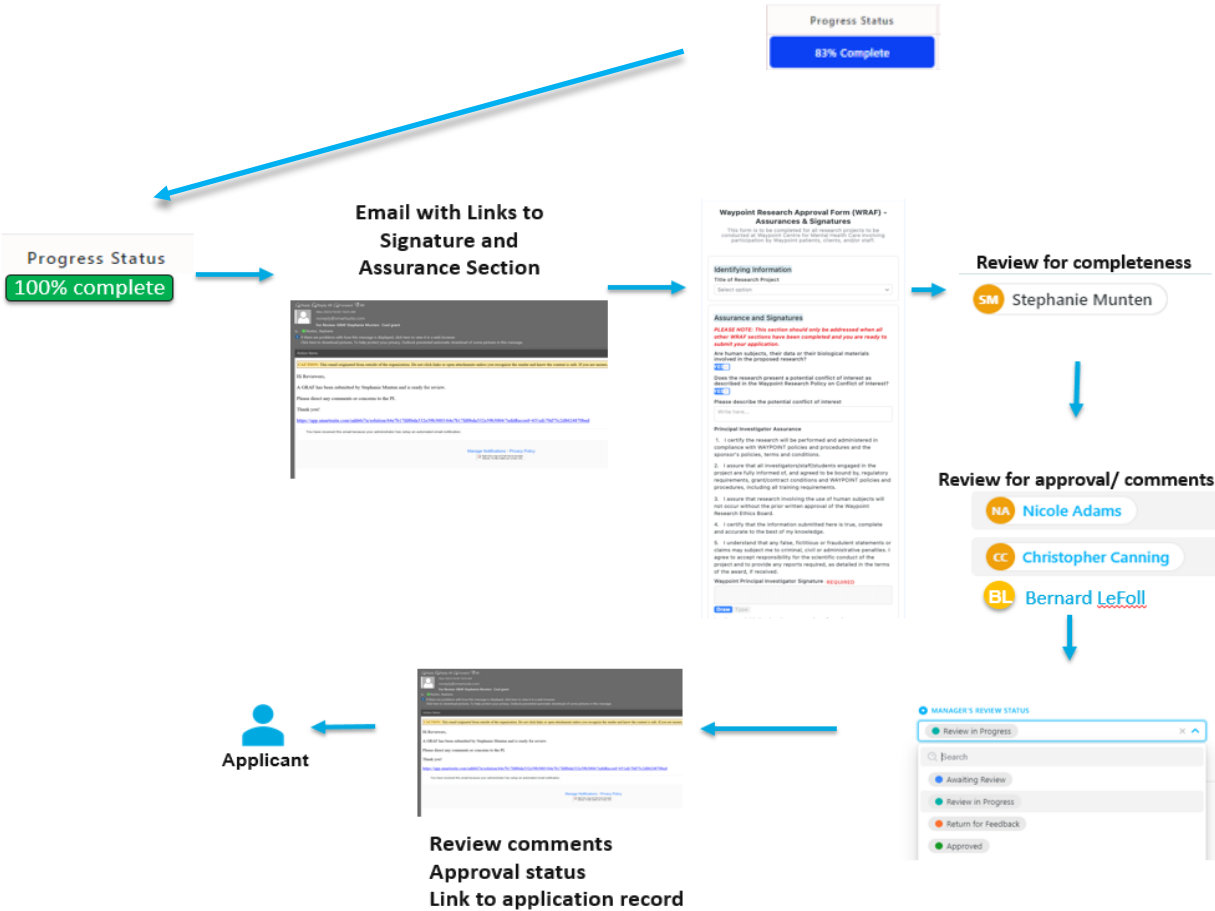
## Project Identifying Info Form

Online form  
Available publicly  
Branching logic  
Saves automatically

## Email with Links to WRAF Sections



Can be completed in stages  
Can be completed collaboratively  
Approachable sections  
All contribute to a complete WRAF



## Step by Step Guide for Completing a WRAF

### Starting an Application

The public WRAF link will take you directly to the WRAF online form.

Select from drop-down lists or enter text as indicated throughout the form.

The screenshot shows the 'Waypoint Research Institute' logo at the top. Below it is the title 'Waypoint Research Approval Form (WRAF) - Project Identifying Information' and a subtitle: 'This form is to be completed for all research projects to be conducted at Waypoint Centre for Mental Health Care involving participation by Waypoint patients, clients, and/or staff.' The main section is titled 'Identifying Information' and contains the following fields:

- Corresponding Researcher Name: A drop-down menu with 'Select option' and a downward arrow.
- Project Title: A text input field with 'Write here' and a red arrow pointing to it from the label 'Free text'.
- Project Type: A drop-down menu with 'Select option' and a downward arrow, with a red arrow pointing to it from the label 'Drop down list'.
- Project Keywords: A drop-down menu with 'Select option(s)' and a downward arrow, with a red arrow pointing to it from the label 'Drop down list'.
- Is this research project being conducted by a student in partial fulfillment of a degree program at any University or College?: A radio button labeled 'NO'.
- Is this project externally funded?: A radio button labeled 'NO'.

The form contains branching logic, so based on your answers, different fields will be available to complete.

### Linking to a Grant Request Application Form (GRAF)

If a GRAF has already been submitted for the given project, many details of the project will auto-populate from the GRAF into the WRAF once the correct project has been selected to link the applications (i.e., *Link to Grant Application* field).

WAYPOINT RESEARCH INSTITUTE  
RESEARCH | COLLAB | GROW

## Waypoint Research Approval Form

This form is to be completed for all research projects to be conducted at Waypoint Centre for Mental Health Care involving participation by Waypoint patients, clients, and/or staff.

### Identifying Information

Corresponding Researcher Name  
Select option

Is this research project being conducted by a student in partial fulfillment of a degree program at any University or College?  
 NO

Project Title  
Write here

Project Type  
Select option

Is this project externally funded?  
 NO

Link to Grant Application  
Select option(s)

Once you have completed all the required and relevant fields, you can select “Submit”.

**NOTE:** If required fields are not completed, you will be alerted of the omission(s). Form submission will not be completed until all required fields are complete.

### Completing an Application

Once you have completed and submitted the first sub-form, you will be prompted via email to complete the remaining WRAF sub-forms.

Subsequent WRAF sub-form include:

Project Milestones & Investigators: <https://form.smartsuite.com/sahb6i7n/4xP5vwkq1C>

Contracts & Agreements: <https://form.smartsuite.com/sahb6i7n/qi0yQXHYvD>

Abstract: <https://form.smartsuite.com/sahb6i7n/1EbrMrETvZ>

Unfunded Areas: <https://form.smartsuite.com/sahb6i7n/ByK6Qj3Ryd>

Resources: <https://form.smartsuite.com/sahb6i7n/FpdOtlE91s>

You can complete these sub-forms in whichever order you would like. They may also be filled out in collaboration with your team (i.e., you may assign different forms to team members to complete).

All of these sub-forms will be linked to the initial WRAF sub-form (*Project Identifying Information* form) based on the *Title of Research Project* field. This field is an auto-populated single-select field that will show you names of incomplete WRAFs. If another team member is completing a specific WRAF sub-form, please let them know which project title you are submitting the WRAF for to ensure it is linked to the main project by the *Title of Research Project* field.

You have the option to work on the subsequent forms in any order that you wish, and they can be completed in one work session or multiple sessions. If you exit the WRAF sub-form before it is complete and submitted, the system will save your work to continue next time you (the same applicant) open the WRAF form link.

### Details about certain WRAF Sub-forms

**Abstract:** The abstract section may be completed directly on the form or be copied and pasted from a pre-existing project document (e.g., word document).

**Unfunded Areas:** This form is required only when the project being submitted is indicated as unfunded.

**Resources:** The *Internal Resources* and *External Resources* sections in this form allow you to select all departments that apply. When a department is selected, additional information fields for that area will open in the form below to complete.

The image shows a screenshot of the 'Internal Resources' form. On the left, there is a section titled 'Internal Resources List' with a search bar and a list of departments. Two departments are selected: 'Communications and Fund Development' and 'Pharmacy'. A red arrow points from the 'Communications and Fund Development' entry in the list to a detailed sub-form on the right. This sub-form is titled 'Internal Resources' and contains a description field, an 'Estimated cost' field, and a 'YES' button for 'Are the costs covered by external funds?'. Below this, another sub-form is visible for 'Pharmacy', also with a description field, a 'Cost' field, and a 'YES' button for 'Are the costs covered by external funds?'. The 'Communications & Fund Development' and 'Pharmacy' titles in the sub-forms are circled in red.

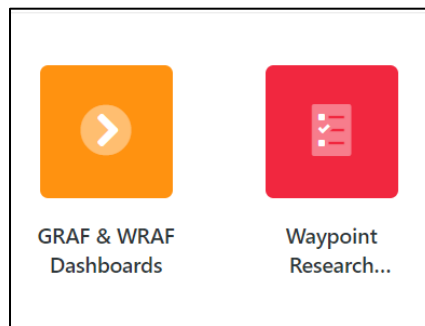


**Assurances & Signatures:** The link to this form will be sent to you last, when all other WRAF areas are marked as “Complete – Ready for Submission”. By submitting this form, you are submitting your completed WRAF to the Waypoint Research Institute (WRI). More information on this is explained below in

[Submitting your WRAF for Review.](#)

## Reviewing Sections of your WRAF and Marking as Complete

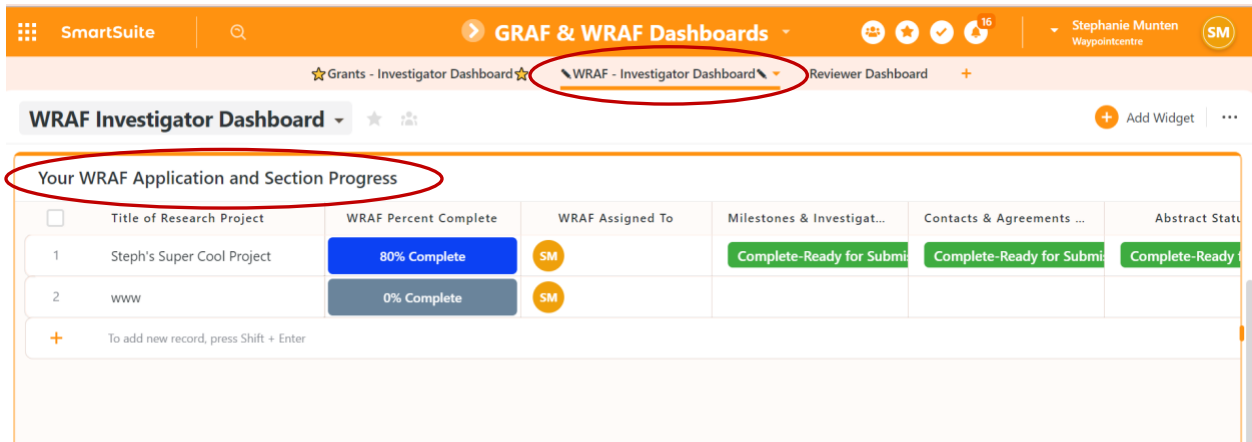
When you submit WRAF sub-forms, you will have access to these records by logging into your SmartSuite account (<https://smartsuite.com/>) and selecting the *GRAF & WRAF Dashboards* or the *Waypoint Research Application* solution. Only a record holder or assigned team member will see the particular application that they are part of.



Once you are in the *GRAF & WRAF Dashboard* or the *Waypoint Research Application* solution, you will have access to all records that you are associated with under each WRAF Section/ Table.

The Tables in *GRAF & WRAF Dashboards* solution are as follows:

- 1) *WRAFs – Investigator Dashboard*: this dashboard summarizes information from all Tables in the *Waypoint Research Application* solution.

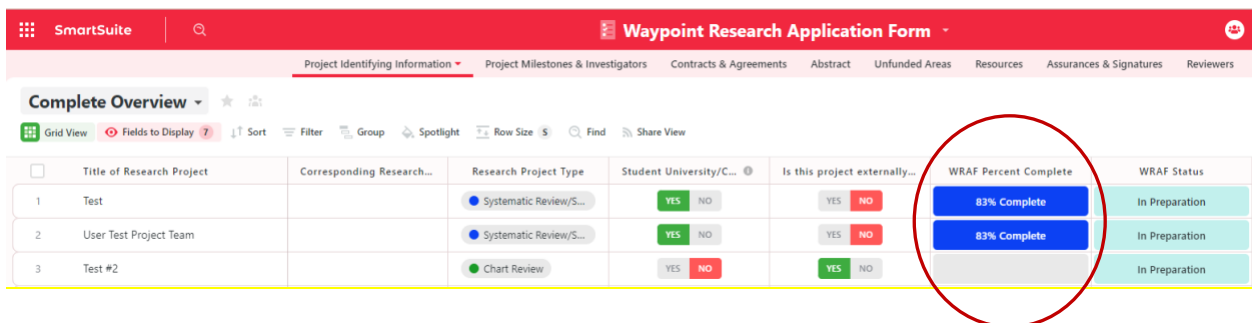


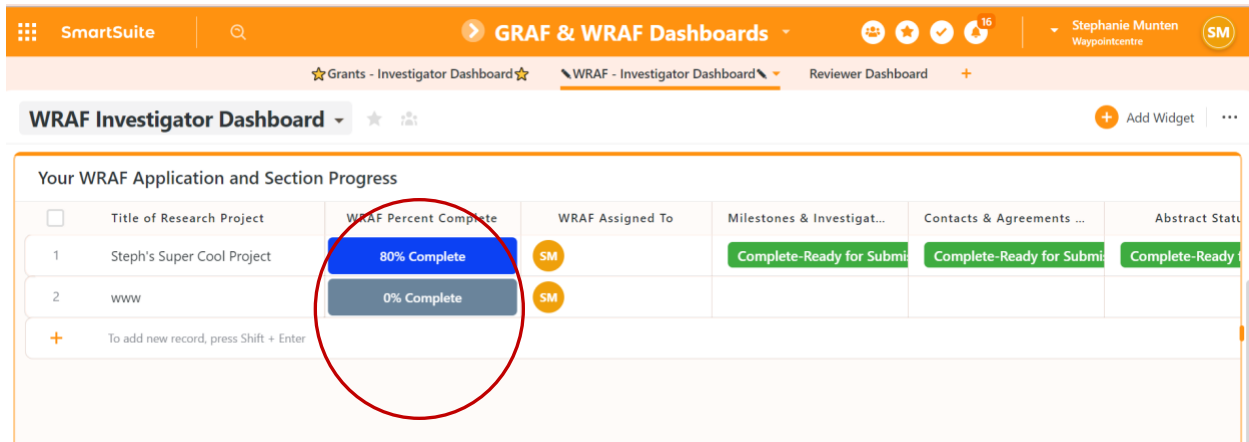
The form sections are found in separate Tables in the *Waypoint Research Application* solution and are as follows:

- Project Identifying Information
- Project Milestones & Investigators
- Contracts & Agreements
- Abstract
- Unfunded Areas
- Resources
- Assurances & Signatures

### Project Identifying Information Section

This section provides an overview of the project (as submitted) and also a percent complete field. This is an auto-calculation of the completion status of the full application based the number of sections completed that are linked to the project.

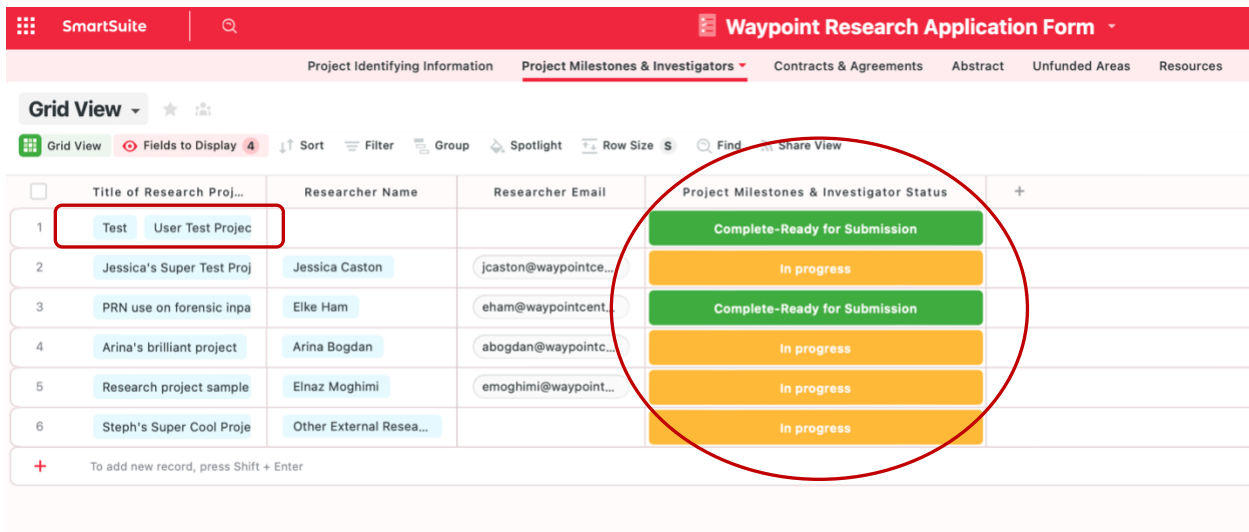




In order to update the “WRAF Percent Complete” mentioned above, a status field within each WRAF section needs to be changed.

Each section has a status field labelled “[Name of Section] Status”. This Status field has three options:

- 1) Not Started – this is the default status assigned before you have submitted the initial form.
- 2) In-progress – this status will show once you have submitted the section’s form
- 3) Complete – Ready for Submission – This status indicates that you have reviewed the section, confirmed all information is complete and accurate, and the section is ready to be submitted. This check is particularly important if you have assigned a WRAF section to another project team member to complete. We ask that the PI review all sections prior to submission.



Within the Waypoint Research Application solution (above), you can select the specific WRAF record from the specific WRAF section.

You may see the full record of the form section by double clicking your record. The following window will display:

Project Milestones & Investigators #001

Test, User Test Project Team: WRAF Milestones & Investigators

WRAP IDENTIFIER

Test, User Test Project Team: WRAF Milestones & Investigators

Identifying Information

TITLE OF RESEARCH PROJECT - REQUIRED

Test

User Test Project Team

RESEARCHER NAME

RESEARCHER EMAIL

PROJECT MILESTONES & INVESTIGATOR STATUS

Complete-Ready for Submission

Project Milestones

Investigators

+ Add new field to this Table

Last updated by Linnea Assen-Johnston on Oct 31, 2023 at 3:03 PM

Cancel Save

As you review the WRAF record, you can add to or modify the information.

**NOTE:** All fields, even if irrelevant, will show in this review. Although a user can add to an application in the record view, it is HIGHLY recommended that a WRAF be started through the WRAF sub-forms (found on the links noted above), as there is a significant amount of branching logic that is only functional in the WRAF form view.

**NOTE:** Guest users cannot modify information in a record view except to update status fields.

Once your review of the WRAF section is finished, and you have no other information to add or complete, please change the Status field to “Complete – Ready for Submission” using the drop-down function in record view or in the Table view.

Project Milestones & Investigators #001

Test, User Test Project Team: WRAF Milestones & Investigators

WRAF IDENTIFIER  
FK Test, User Test Project Team: WRAF Milestones & Investigators

Identifying Information

TITLE OF RESEARCH PROJECT - REQUIRED  
Test  
User Test Project Team

RESEARCHER NAME  
RESEARCHER EMAIL

PROJECT MILESTONES & INVESTIGATOR STATUS  
Complete-Ready for Submission

Project Milestones

Investigators

+ Add new field to this Table

Last updated by [Lionel Assen-Johnston](#) on Oct 31, 2023 at 3:03 PM

Cancel Save

Waypoint Research Application

Milestones & Investigators Contracts & Agreements Abstracts

Size S Find Share View

Project Milestones & Investigator Status
Complete-Ready for Submission
In progress
Complete-Ready for Submission
In progress
In progress
In progress

## Submitting your WRAF for Review

Once all sub-forms of your WRAF are marked as “Complete – Ready for Submission”, your overall WRAF Percent Complete will update to 100% and you will receive the link to the final WRAF sub-form (*Assurances and Signatures*) via email.

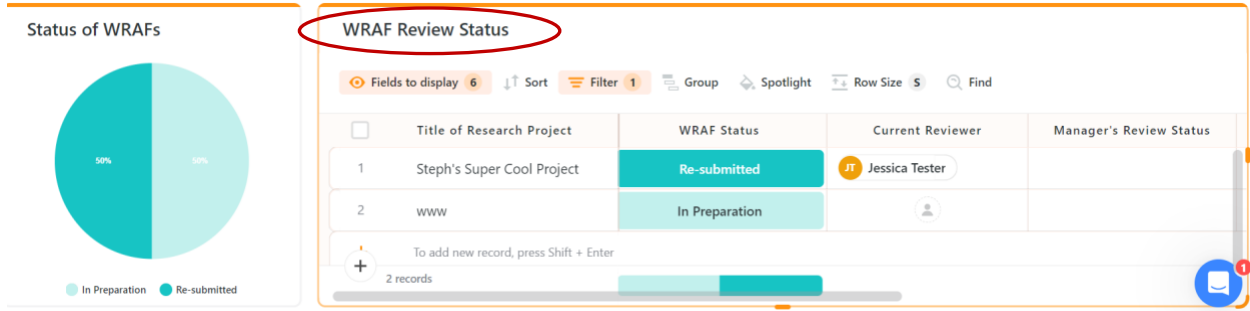
Assurances & Signatures: <https://form.smartsuite.com/sahb6i7n/YQOFTvHEQW>

By completing this final form, you are submitting your WRAF for review by the Research department.

**NOTE:** Do not complete this section until you are ready to submit your WRAF for review.

## Viewing Status of Application

All of the WRAFs you have submitted will be shown in *WRAF – Investigator Dashboard* Table of *GRAF & WRAF Dashboards* solution or the *Project Identifying Information* section of the *Waypoint Research Application* solution.



SmartSuite | Waypoint Research Application Form

Project Identifying Information | Project Milestones & Investigators | Contracts & Agreements | Abstract | Unfunded Areas | Resources | Assu

Complete Overview

Title of Research Project	Corresponding Researcher	Research Project Type	Student University...	Is this project external...	Progress Status
1 Test		Systematic Review...	YES NO	YES NO	83% Complete
2 User Test Project Team		Systematic Review...	YES NO	YES NO	83% Complete
3 Test #2		Chart Review	YES NO	YES NO	

By selecting a specific record here, you will also be able to view the status of your WRAF application review. As Reviewers are assigned to your WRAF, you will see the status of your application change to “Review in Progress” and will be able to see who the current reviewer is.

Project Identifying Information #001

**Test**

TITLE OF RESEARCH PROJECT • REQUIRED  
Test

CORRESPONDING RESEARCHER NAME  
+ Link to employee from Researcher Directory

EXTERNAL RESEARCHER NAME  
Title First Name Last Name

RESEARCHER EMAIL EXTERNAL RESEARCHER EMAIL  
Enter email address

RESEARCH PROJECT TYPE • REQUIRED  
Systematic Review/Scoping Review OTHER RESEARCH PROJECT TYPE  
Write here

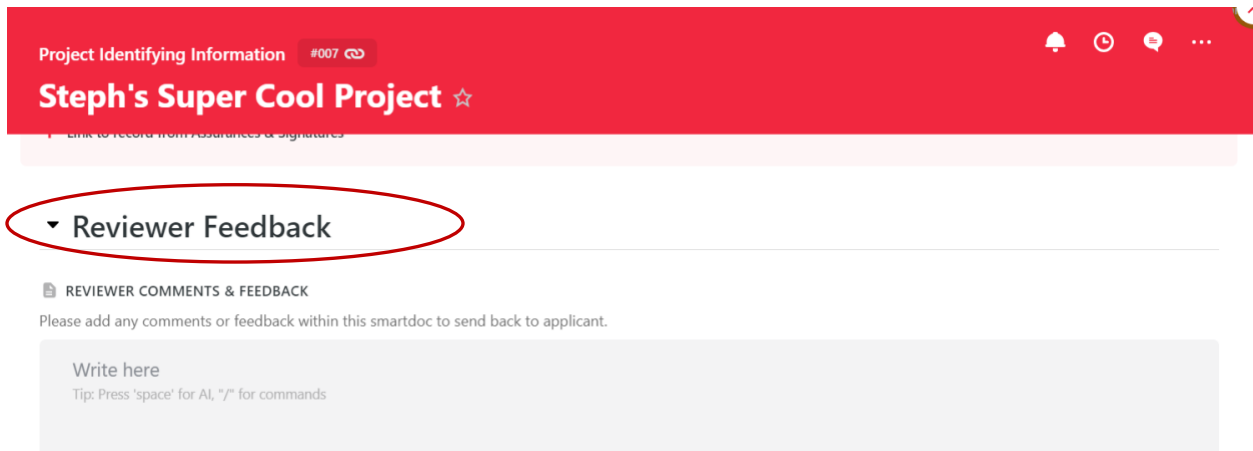
WRAF PERCENT COMPLETE  
83% Complete

WRAF STATUS CURRENT REVIEWER  
Review In Progress Nicole Adams

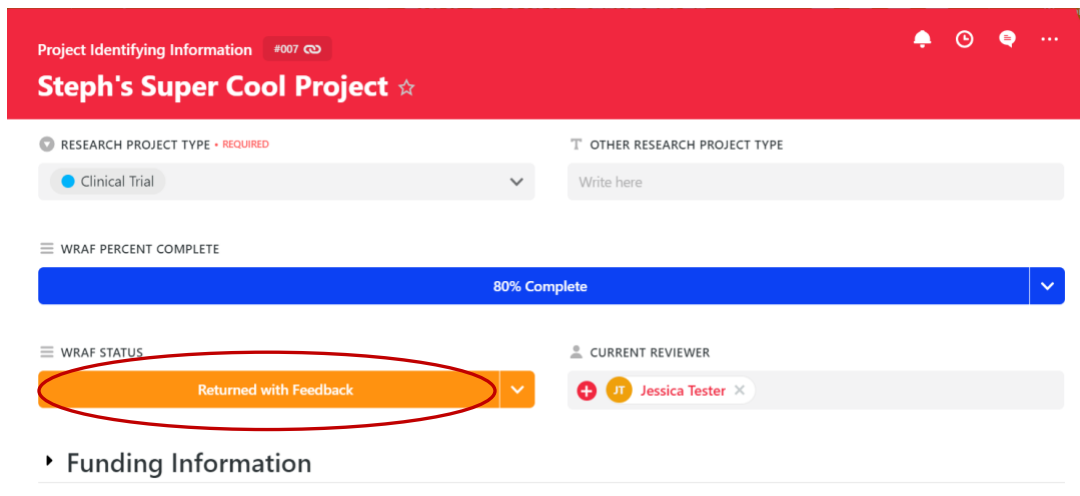
Last updated by Stephanie Munten on Oct 27, 2023 at 9:58 AM Cancel Save

## WRAF Returned with Feedback

When the WRAF review is complete, you will receive an email, through SmartSuite, communicating the review decision (“Returned with Feedback” or “Approved”) as well as a summary of the comments made by the reviewers within your application. These comments will also be available within the *Reviewer Comments & Feedback* field.



When reviewers have questions or feedback for you about your WRAF, the status of your application will change to “Returned with Feedback”.



WRAF Review Status

Fields to display 6 | Sort | Filter 1 | Group | Spotlight | Row Size 5 | Find

Title of Research Project	WRAF Status	Current Reviewer	Manager's Review Status
Steph's Super Cool Project	Returned with Feedback	J Jessica Tester	
2 www	In Preparation		

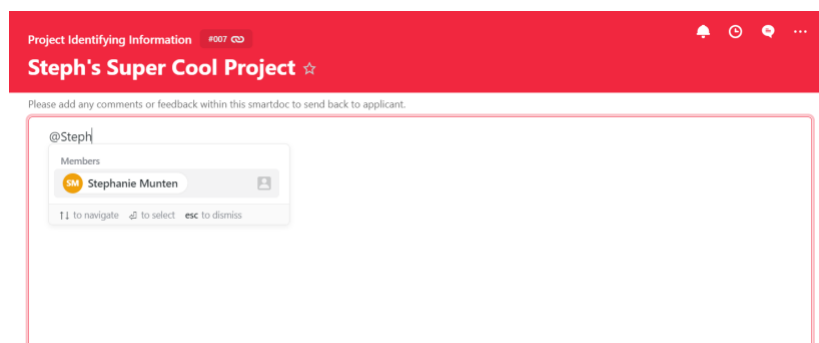
To add new record, press Shift + Enter

2 records

## Responding to Questions/ Comments within SmartSuite

Reviewers assigned to your application can make comments or provide feedback in the *Reviewer Comments & Feedback* field within the WRAF record. This document allows you to tag specific individuals if they need to address specific comments being made.

You can also assign a comment to a specific user by using the @ symbol in front of their name. This may be helpful when you are addressing comments and revisions within the WRAF record.



When you are mentioned in a comment, you will also receive an email notification notifying you that specific feedback for you is available.

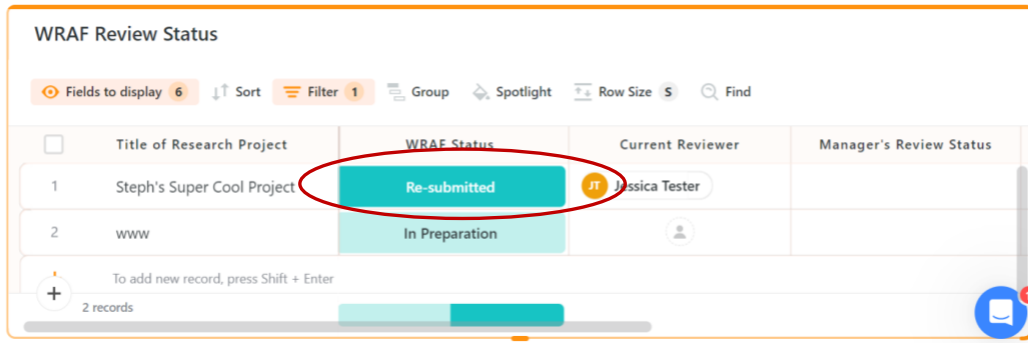
## Addressing Feedback

You can answer questions from reviewers directly in the *Reviewer Comments & Feedback* field within the WRAF record. If modification are requested within your application, please revise the applicable field(s) within the record.

Once all feedback has been addressed and you are ready to notify reviewers that questions and changes have been addressed, please change the WRAF status from "Returned with Feedback" to "Resubmitted".

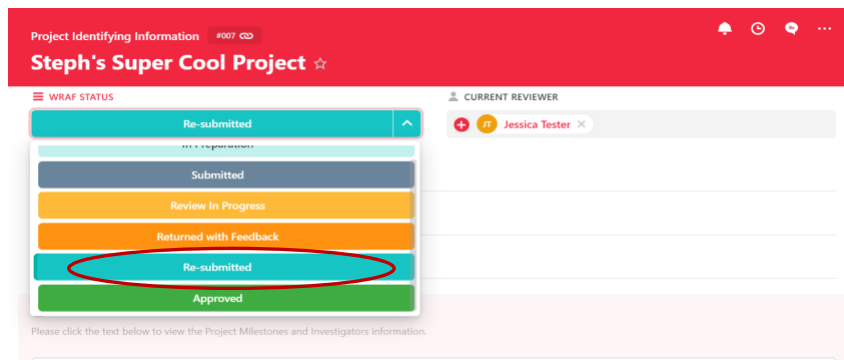


This will return the WRAF to the reviewers for subsequent review. This process may be repeated as needed.



The screenshot shows a table titled "WRAF Review Status" with the following columns: Title of Research Project, WRAF Status, Current Reviewer, and Manager's Review Status. The first row shows "Steph's Super Cool Project" with a "Re-submitted" status, which is circled in red. The current reviewer is "JT Jessica Tester". The second row shows "www" with an "In Preparation" status. The table includes standard UI controls like "Fields to display", "Sort", "Filter", "Group", "Spotlight", "Row Size", and "Find".

	Title of Research Project	WRAF Status	Current Reviewer	Manager's Review Status
1	Steph's Super Cool Project	Re-submitted	JT Jessica Tester	
2	www	In Preparation		



The screenshot shows the project details for "Steph's Super Cool Project". The "WRAF STATUS" dropdown menu is open, showing options: Re-submitted (circled in red), Submitted, Review In Progress, Returned with Feedback, Re-submitted, and Approved. The "CURRENT REVIEWER" is listed as "JT Jessica Tester".