



SUBMISSION INSTRUCTIONS

- The full program guidelines can be found on the [OCE website](#).
- Application deadlines can be found on the OCE website.
- Application needs to be initiated by submitting the online Eligibility Questionnaire prior to the Initiation Deadline. OCE will review this questionnaire within 2 business days.
- If the applicant meets program eligibility criteria, OCE will initiate an online application in the online application system, AccessOCE. The eligible applicant will receive 2 email notifications, one to confirm initiation process is completed and another with log-in information for AccessOCE in order to complete the Application
- Application must be submitted by 2:00pm on the date of Application Submission Deadline

GENERAL INSTRUCTIONS FOR COMPLETING THE ONLINE APPLICATION FORM

1. Upon receiving access to the application, please ensure that the application status is listed as "Application in Development".
2. Click on each of the tabs, beginning with "Application Information", and complete all of the mandatory fields in each section. Appendix 1 provides a detailed description of the requirements for each section.
3. During the process of completing your application, if you wish to submit the application at a later time, click on the "Save & Finish Later" button.
 - You may log back into AccessOCE with your username and password to continue with your application.
 - To confirm that all mandatory fields are completed, click on the "Validate" button.
 - To preview your entire application, click on the "Preview Application" button on the right side of the screen.
4. When you are ready to submit the application, click on the "Validate & Submit" button.
 - Any mandatory fields that are incomplete will be listed. Complete these fields and click on "Validate & Submit" again.
 - Once you have submitted your application please check that the status of your application has changed to "Pending Project Accountant Review". The status is visible at the top of your screen below the application title OR in the Home page of your AccessOCE account.

REVIEW AND ASSESSMENT OF APPLICATIONS

1. Applications are internally reviewed for completeness, eligibility and use of funds prior to external evaluation. As part of the internal review process of your application, OCE may request additional information, clarifications or provision of missing items. You will be notified of any deficiencies via e-mail by OCE Application Support. The status of your application will change to "Requires Revision" at this point. Please correct all deficiencies and resubmit the



application within the requested timeframe. Once the application has been deemed complete, it will proceed to external review.

PROGRAM CONTACTS

- For inquiries related to eligibility, contracting and funding disbursements:
 - Alexandra Ho, Program Manager (alexandra.ho@oce-ontario.org, 416-861-1092 x5018)
- For general inquiries about the online application system and application form:
 - OCE Application Support (application-support@oce.zendesk.com, 416-861-1092 x2400)
- For inquiries related to budget or source of funds:
 - OCE Finance Review (program-finance@oce.zendesk.com, 416-861-1092 x1090)



APPENDIX 1: DETAILED APPLICATION INSTRUCTIONS

APPLICATION INFORMATION TAB

1. Application Title
 - Provide a descriptive title outlining the focus of the application/project. Please ensure that the spelling and grammar are correct, since titles of approved projects will be posted on OCE's website.
2. Academic Institution
 - Select Not Applicable (Academic Institution affiliation is not required)
3. Duration
 - Provide the duration for completion of the proposed activities. Ensure that the duration is realistic and within the program guidelines (maximum 12 months).
 - If the project is approved, the start date will be set once all requirements for activation of the project are met, and the end date will be automatically calculated based on the project duration.
4. Correlating Endorsing Agency
 - Provide the name of the Endorsing Agency that had signed the Endorsement Form
5. Summary of Proposal for Public Release
 - Provide a short (250-word maximum), plain-language description of the project, which you approve for public release and for posting on OCE's website if the application is funded by OCE. Do not include any contact information. Please ensure that the spelling and grammar are correct, since summaries of approved projects will be posted on OCE's website.
6. Project Category
 - Select the classifications that most accurately reflect your application/project. All fields (main and sub-categories) must be selected.
 - A. CFI Code: Select first the primary code and then the secondary code from the drop-down list (select Other Research if none are applicable).
 - B. CFI Discipline: Select first the primary discipline and then the secondary discipline from the drop-down list.
 - C. Application Stage Gate: Select the most appropriate description based on the stage of your application/project
 - **Discovery (stage 0)** - The first part of any product development. During this basic stage the development team is simply deciding what projects the company wants and is capable to pursue.
 - **Scoping (stage 1)** - The product and its corresponding market are evaluated. The researchers must recognize the strengths and weaknesses of the product and what it is going to offer to the potential consumer.
 - **Building the Business Case and Plan (stage 2)** - The last stage of concept development where it is crucial for companies to perform a solid analysis before they begin developing the product.
 - **Development (stage 3)** - Plans from previous steps are actually executed. The product's design and development is carried out, including some early, simple tests of the product and perhaps some early customer testing. The product's marketing and production plans are also developed during this stage.
 - **Testing and Validation (stage 4)** - Validation is provided for the entire project. The areas that will be evaluated include: the product itself, the



production/manufacturing process, customer acceptance, and the financial merit of the project.

- **Product Launch (stage 5)** - The culmination of the product having met the proper requirements of the previous stage-gates. Development teams must come up with a marketing strategy to generate customer demand for the product. The company must also decide how large scale they anticipate the market for a new product to be and thus determine the size of their starting volume production. In addition part of the launch stage is training sales personnel and support personnel who are very familiar with the product and that can assist in market sales of this product.
- D. Ontario Innovation Agenda: Select one of the following sectors which best reflects your project:
- Bio-economy and clean technologies
 - Advanced health technologies
 - Pharmaceutical research and manufacturing
 - Digital media and information & communication technologies
 - Advanced manufacturing
- E. FedDev Category: Select the most appropriate description from the drop-down list.
- F. NAICS Code: Please click on the link to search for the 5-digit NAICS code that best reflects the sector your company aligns with. Enter into the space provided.
- G. Census Division: Please click on the link to identify your company's census division and enter into the space provided.

7. Keywords

- Add keywords that describe the technical elements of the application. This will assist OCE in identifying suitable expert reviewers.

TEAM INFORMATION TAB

1. Applicant Information

- The Primary Applicant is recipient of the OCE funding. For this program, the primary applicant must be a key member of the startup company.
- The email address of the Primary Applicant must have the same domain as the company website
- Please ensure email address and phone number correct since this may be used for future communication with applicant
- Please ensure all fields are completed

2. Project Team Members

- Click on the button "Click here to Enter/Edit Team Member Table" to open the Team Table.
- List all team members who are contributing to the advancement of this project. If a team member is yet to be identified, list their name as "TBD" and include a description of the required expertise. Ensure that the list of team members is in alignment with the activities in the Milestone table.

PROPOSAL TAB

1. Milestones

1. Click on the button "Add/Edit Milestone" to enter project milestones.
2. Add one line for each key project milestone/activity (limit the description to 100 words). Enter the key team member(s) responsible for the activity, expected outcomes and time frame.
3. For the time frame, enter the estimated start and end month of the activity (e.g. From Month 1 to Month 3).

4. Milestones/activities must be specific enough for a reviewer to assess the major activities and decision points within the project. They will also be used in reports by OCE to assess project progress and outcomes.
2. Proposal
 1. Click on the button "Download Proposal Template" to open a fillable word document containing the Proposal questions.
 2. Complete all questions in the template.
 3. Save the completed file as a pdf document.
 4. Click on the button "Upload Proposal" to upload the pdf file to the application.
 3. Endorsement
 5. Click on the button "Download Endorsement Template" to open a fillable word document. Complete all questions and obtain Endorser signature. When complete, save as pdf document and upload to 'Support Document Tab'.

USE OF FUNDS TAB

1. Sources of Funds
 1. Review the list of Funding Contributors to ensure all sources of cash and/or in-kind contributions are included in the budget
2. Budget
 1. Click on the button "Add/Update Budget Item" to enter the project budget.
 2. Click on the + button to enter new budget line items. Ensure that expenses are separated by source of funds (OCE and Project Contributor).
 3. Enter a brief description of the activities related to the budget line
 4. Enter who is going to receive the funds (Payee) and where the funds will be spent (Location)
 5. Select one of the available expenditure types (Category) from the drop down list
 6. Select the appropriate Source of Funds from the drop down list
 7. Select the Type of Funds (cash or in-kind) from the drop down list
 8. Enter the Quantity, Unit and Rate (see the example calculation below)
 9. Please ensure that the totals in the budget table reflect at a minimum the required matching contributions for the program (e.g., if the match is 1:1, the OCE cash contribution must equal the contribution from the Project Contributor)
 10. Enter any Other Contributions if applicable. "Other Contributions" are cash or in-kind support received from other funding sources currently held by the applicant that is conceptually or financially related to the current application to OCE. These funding sources are not party to the OCE funding agreement.
 11. Once all items are completed, click the "Save Budget" button and close the budget.
 12. For a list of eligible expenses, please see the following link:
<http://www.oce-ontario.org/docs/default-source/default-document-library/ssf-schedule-c-eligible-expenses.pdf?sfvrsn=2>

[Click here for a video tutorial](#)

Description	Budget Category	Quantity	Unit	Rate	Total	Calculation
Dr. A working 65 hours on Milestone 1 for one month. To be paid \$3,500 for this task.	Salary & Benefits	0.43	Month	\$8,139.50	\$3,500	@150hrs work month (37.5 per week, official work week in Canada), 65 hrs = 65/150 = 0.43 months; Rate = Total/Quantity: 3500/0.43 = 8,139.5

3. Budget Justification



1. Referring to the Budget Table, provide additional information to justify how OCE and other funds/in-kind support (as applicable) will further the company's goals as detailed in the plan, activities and outcomes. Outline how those sections are related to the proposed budget. Please note, it is mandatory to complete the section.
2. Clearly quantify and justify the in-kind contributions. For salary in-kind contributions, indicate the role of company personnel, the number of hours to be devoted to the project, the hourly rate of compensation used to assess the value of the in-kind contribution, and how the total value was calculated. The maximum allowable rate for salary in-kind is \$100/hr.

SUPPORTING DOCUMENTS TAB

Attach the following documents in the associated upload section:

1. Resume, Curriculum Vitae, NSERC Form 100CV or NSERC Form 103CV and/or LinkedIn Profile(s) of applicant, and other key team members associated with the application.
2. Proof of Age – government-issued identification with the applicant's name and date of birth
Proof of Canadian Citizenship Status – Examples include: birth certificate, passport, Citizenship Card, or Permanent Resident Card.
3. Proof of matching cash contribution required for the non-youth led \$30,000 and youth led \$60,000 streams. Optional for the youth led \$30,000 stream. See program guidelines for details.
4. Start-up Endorsement form (this form MUST be in PDF format)
5. Any additional supporting documents that are relevant to your application (that are not included in the mandatory attachments). This may include additional figures, business plans, publications, patents, or other documents. Please note that reviewers are not obligated to read these additional documents in their assessment of the project.

TERMS AND CONDITIONS TAB

All terms and conditions must be checked prior to submission.