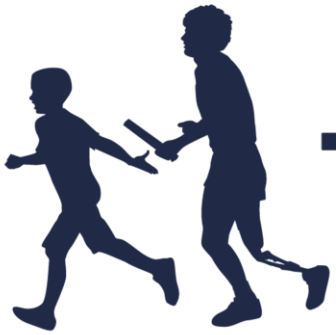


INSTITUT DE RECHERCHE
TERRY FOX
RESEARCH INSTITUTE

TerryFoxTrack User Manual

VERSION 1.0 | November 1, 2026

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Overview

Terry Fox Research Institute (TFRI) has implemented an online grant management system, TerryFoxTrack (TFT), that supports the full funding lifecycle, from application submission to award management and reporting.

This user manual is designed to assist applicants in creating and managing a TFT account and navigating the application process. It provides step-by-step instructions for setting up an account, accessing funding opportunities, completing and submitting applications, responding to revision requests, and monitoring application status throughout the review process.

Support

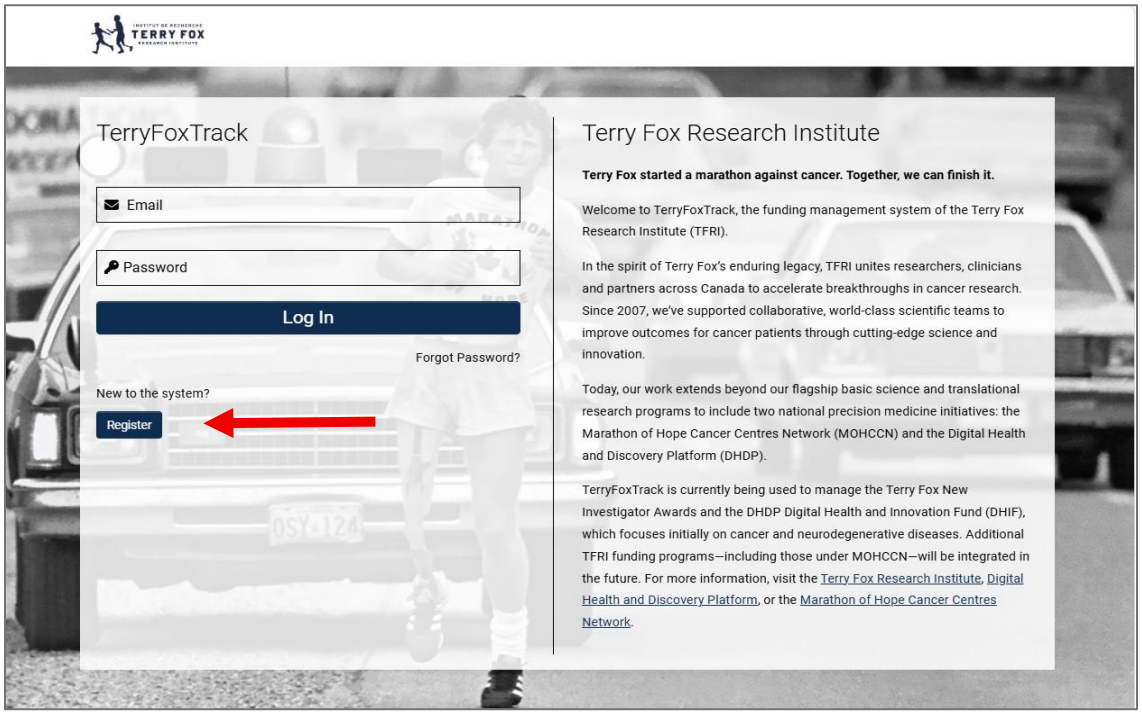
If you need assistance of any kind, please do not hesitate to contact the TFT help desk and we will make every effort to respond as soon as possible.

General email: track@tfri.ca

Accessing TerryFoxTrack

TerryFoxTrack (TFT) can be accessed directly at tfri.smartsimple.ca or through links available on the TFRI website (tfri.ca).

On the TFT login page, click **"Register"** under **"New to the System"**.

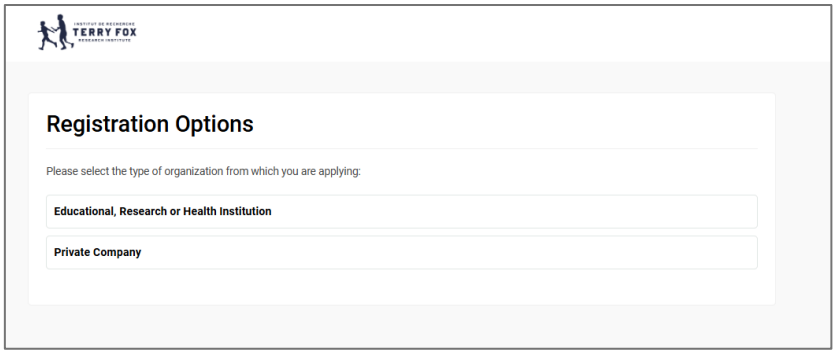


Registering a New Account

You will be directed to the **Registration Options** page, where you will be asked to select the type of organization with which you are affiliated.

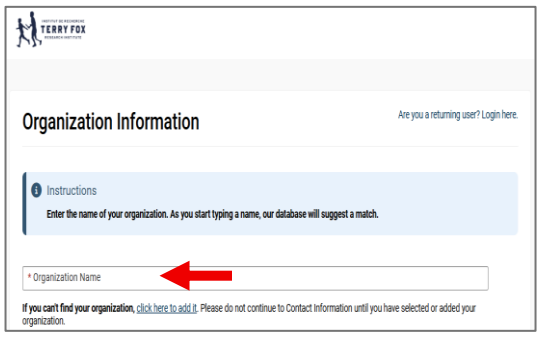
Note: Additional organizations can be added to your profile after registration.

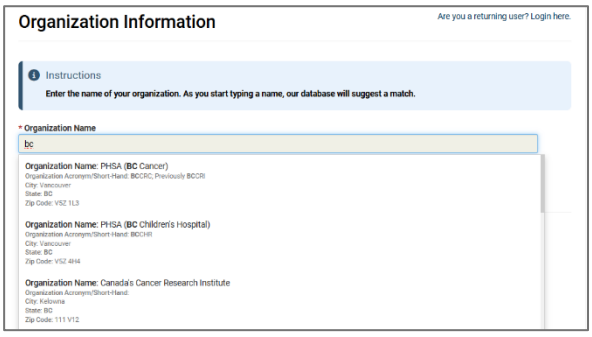
The registration process is similar for organization types. Select the option that best describes your Primary Organization.



If your Organization is Already Listed

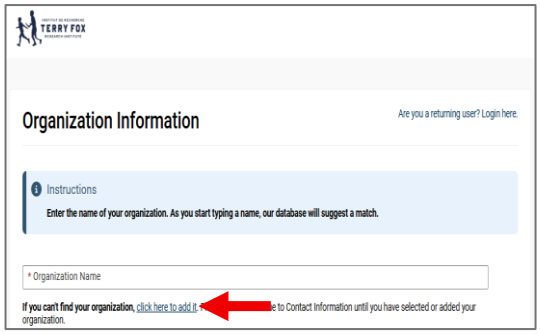
1. Begin typing the name of your organization.
2. Select the appropriate organization from the dropdown list.
3. If your organization does not appear, proceed to **Adding an Organization to the Database** below.

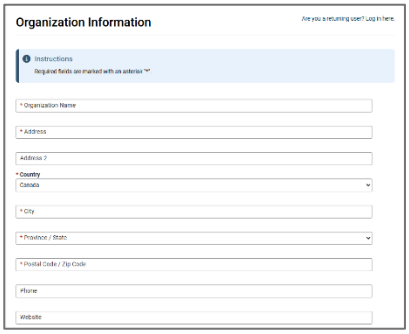




If your Organization is Not Listed

If your organization does not appear in the dropdown list, select **"Click here to add it"**.





Adding an Organization to the Database

Complete all required organization fields. Required fields are marked with a red asterisk (*).

Completing Your Registration

After selecting or adding your Primary Organization:

1. Complete all required fields under **Contact Information.** Required fields are marked with a red asterisk (*).
2. Complete the **Equity, Diversity, Inclusion and Accessibility (EDIA)** self-declaration form.
    - If you do not wish to self-identify, select **"Prefer not to answer"** for each question.

3. Click **“Submit”**.

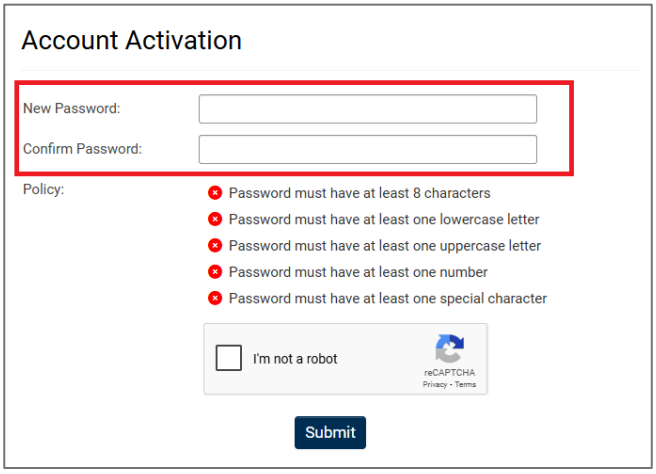
The system will validate your information and notify you if any required fields are incomplete.

If your registration is successfully submitted, you will receive a confirmation message indicating that an email has been sent to your registered email address.

> **Note:** Email delivery may take several minutes. If you do not receive an email, check your junk or spam folder.

Once you receive the email:

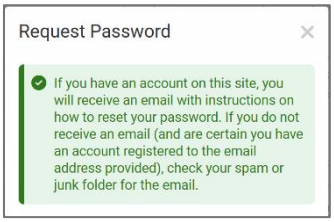
1. Click the registration link provided.
2. Create a password that meets the system password requirements.
3. Click **“Submit”** to activate your account.



Returning Users

If you are unsure whether you already have a TFT account, click **“Forgot password?”** and follow instructions to reset it.

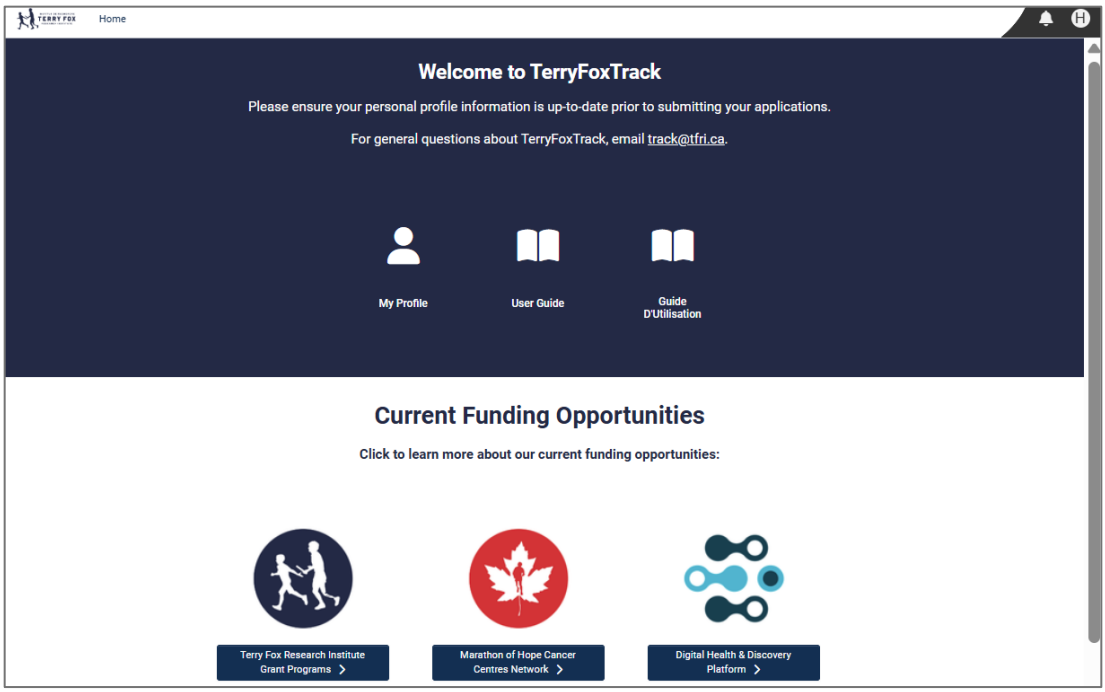
You will receive the following prompt, and a message directing you to reset your password will be sent to your email address.



Home Page

After you have successfully registered and logged in, you will be directed to the Home page.

The Home page contains a top navigation bar and four sections, each with its own heading: *Welcome to TerryFoxTrack, Current Funding Opportunities, My Applications, and My Funded Projects*.



Navigation Bar

TFRI Logo and Home Button

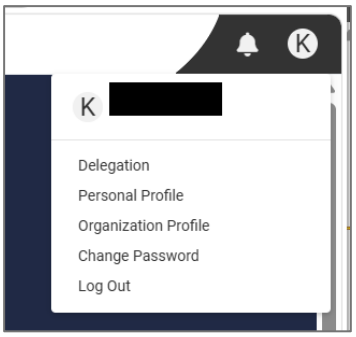
Clicking either the TFRI logo or the Home button will return you to the Home page at any time.

Bell Icon

The bell icon displays notifications and alerts from TFRI.

User Initials

Clicking your initials opens a dropdown menu with the following options:

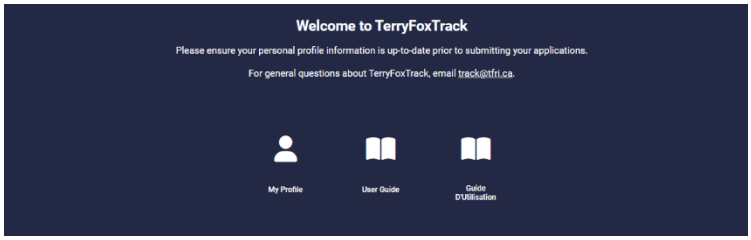


- Delegation
- Personal Profile
- Organization Profile
- Change Password
- Log Out

Welcome Menu

My Profile

Before submitting an application, ensure that your contact information is current and accurate in your personal profile.



Within your profile, select the **Declaration** section under your name to review and complete the Equity, Diversity, Inclusion and Accessibility (EDIA) self-declaration form, if you did not complete this upon initial registration.

Resources

Select **User Guide** to access the user manual.

Current Funding Opportunities Menu

The **Current Funding Opportunities** section provides access to all funding programs that are currently accepting applications. Opportunities are organized by funding stream, as follows:



- **Terry Fox Research Institute (TFRI) Grant Programs**

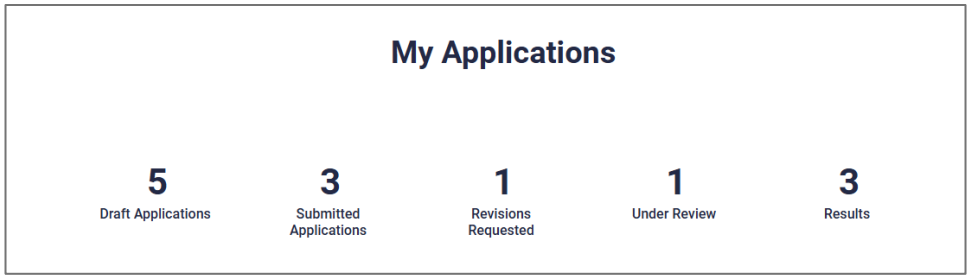
- **Marathon of Hope Cancer Centres Network (MOHCCN)**
- **Digital Health and Discovery Platform (DHDP)**

Select a funding opportunity to open the program page, where you can review active funding calls, eligibility requirements, important dates, and begin the application process.

My Applications

The **My Applications** section provides access to all applications for which you are listed as a Principal Investigator, or when you are acting as a delegate of a Principal Investigator. As your application moves through the review process, it will move automatically between the different application stages displayed in this section.

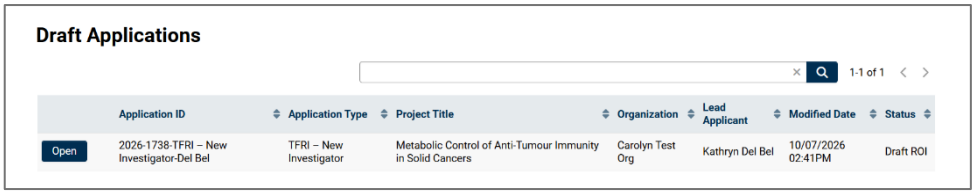
Select a stage to view all applications currently assigned to that stage.



Applications that are approved for funding will be moved to the **My Funded Projects** section.

Draft Applications

The **Draft Applications** section contains applications that are currently in progress, including **Registration of Intent (ROI)/Letter of Intent (LOI)** and **Full Application** drafts. Applications will remain in this section until they are submitted. Select **Open** to continue working on a draft application.



Submitted Applications

The **Submitted** Applications section contains all applications that have been successfully submitted, including applications at both the **ROI/LOI** and **Full Application** stages.

Revisions Requested

If revisions or additional information are required, you will receive an email notification prompting you to log in to the portal.

Applications requiring updates or corrections will appear in the **Revisions Requested** section until the requested changes have been completed and resubmitted.

Under Review

Applications move to the **Under Review** section once they have been assigned to reviewers and entered the evaluation process.

Results

The **Results** section contains all applications for which a final decision has been made. This includes applications that have been:

- Approved for funding
- Declined
- Not eligible
- Withdrawn

Applications will remain in this section for future reference.

My Funded Projects

The **My Funded Projects** section provides access to all projects that have been approved for funding. Once an application is awarded funding, it will move from the **My Applications** section to **My Funded Projects**, where project activities and reporting requirements can be managed throughout the funding period.



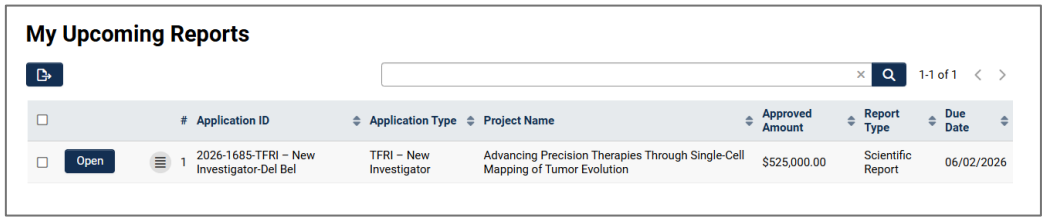
Select a category to view the reports or submission currently assigned to that stage.

Approved Projects

The **Approved Projects** section contains all active funded projects for which you are listed as a Principal Investigator or Project Lead. Select a project to view project details, funding information, and project team members.

My Upcoming Reports

The **My Upcoming Reports** section displays reporting requirements that are due in the future. This allows you to track upcoming deadlines and prepare any required progress, financial, or metrics reports before their submission dates.



Select a report to review reporting requirements and due dates.

Change Requests

The **Change Requests** section contains requests to modify an approved project. Examples may include changes to project timelines, team members, budgets, or other project details that require approval. Extension requests for projects nearing the end of their term are added here as change requests.

Select a change request to view its status, provide additional information, or respond to feedback.

Closed Applications

The **Closed Applications** section contains funded projects that are no longer active. This includes projects that have reached their end date, completed all reporting requirements, or have otherwise been formally closed by the funding organization.

Closed projects remain available for reference and historical record purposes.

Applying for Funding

Before starting your application, review the **Application Guide** for the funding program you are applying to. Program-specific instructions and requirements are available in the corresponding Application Package.

The information in this manual describes features and components commonly found in most applications.

Attachments

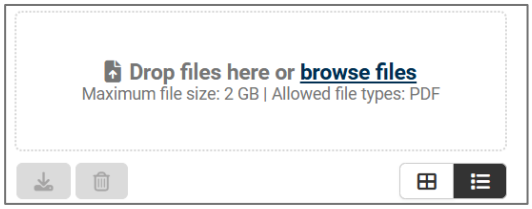
Most funding applications require supporting documents to be uploaded as attachments. Common attachment types include:

- Scientific Proposal (templates are available for each funding program. Consult the applicable Application Guide)
- Letters of Support (Institutional, Mentorship and Collaboration)
- Budget Documentation (e.g., quotes, estimates, and contracts)
- Curriciulum Vitae (CV (templates are available for each funding program. Consult the applicable Application Guide)
- Supplementary Materials (e.g., publications)
- Certificates (e.g., ethics approval, biosafety certificates)
- Signature page

Refer to the applicable **Application Guide** for detailed information about required attachments and proposal templates.

Important: Save your work before uploading documents and again after all documents have been successfully uploaded.

Uploading Attachments



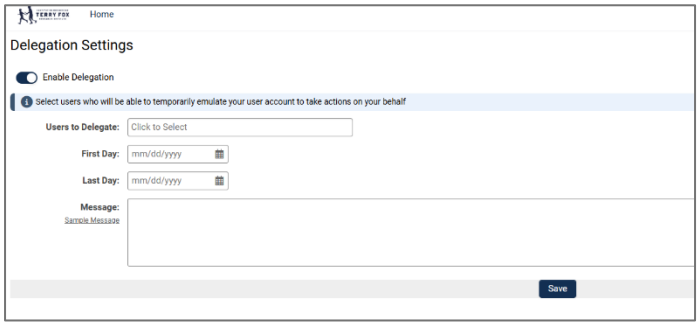
Documents can be uploaded by dragging and dropping files into the attachment area or by selecting files from your computer.

- Accepted file types will be specified for each attachment requirement and are typically in PDF format.
- Follow file naming guidelines from a program-specific **Application Guide** or, when unspecified, use clear file names before uploading documents.
- Verify that each document has uploading successfully before proceeding.

Delegation

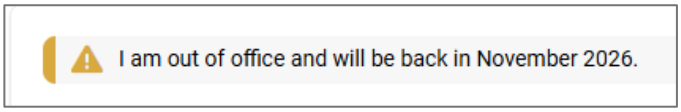
The **Delegation** feature allows you to authorize another registered TFT user to complete tasks on your behalf.

Before assigning a delegate, ensure that the individual has an active TFT account.



Setting Up a Delegate

1. Select your User Initials in the top-right corner of the screen.
2. Open the **Delegation** settings.
3. Enable delegation using the toggle switch.
4. Select one or more users from the registered users list.
5. Specify a **Start Date** and **End Date** for the delegation period.
6. Optional: Enter a message. The message will appear with your user information throughout the system.



Note: Adding a message is optional and is not required to activate delegation.

Delegate Access

When a delegate logs in, they will see the delegation icon in the upper-right corner of the screen.

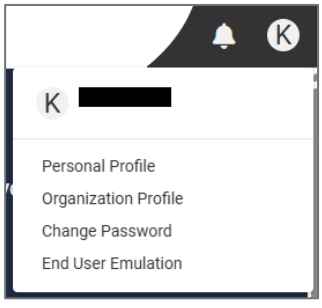


By selecting the delegation icon, the delegate can **emulate your account** and perform tasks on your behalf, including:

- Completing budgets
- Uploading documents
- Submitting applications and reports

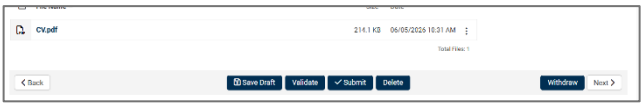
Ending User Emulation

To stop acting on behalf of another user, select **End User Emulation** from the **User Menu**. The delegate will immediately return to their own user account.

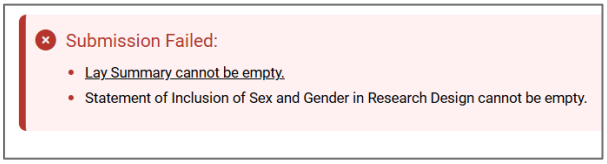


Submitting an Application

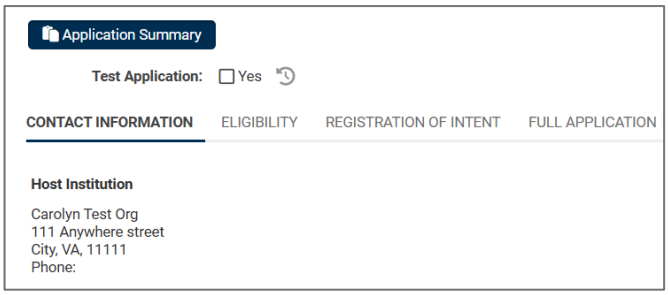
Before submitting your application, select **Save Draft** to ensure that your work is saved and to prevent any information from being lost.



Once you have completed your application, select **Validate**. The system will check that all required fields have been completed and will identify any missing information. Any incomplete fields will generate an error message and must be completed before you can proceed with submission.



Prior to submitting, carefully review your application to ensure that all required information has been entered correctly. Select **Application Summary** to generate a PDF version of your application prior to submission. Review the PDF carefully to confirm that all application information is accurate and that any uploaded files have been attached successfully and display correctly. Once you are satisfied that the application is complete and accurate, proceed with submission.



Note: After an application has been submitted, no further changes can be made.

To finalize your application, select **Submit** at either the ROI/LOI stage or the Full Application stage.

When your application has been submitted successfully:

- A confirmation email will be sent to the email address associated with the Principal Investigator.
- A submission confirmation message will be displayed on screen.



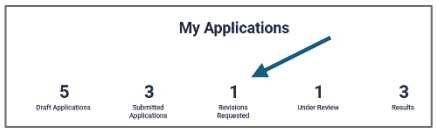
If validation errors are identified, follow the prompts provided by the system, complete any missing information, and revalidate your application before submitting.

Note: A delegate who submits an application on behalf of the Principal Investigator will **not** receive an email confirming submission.

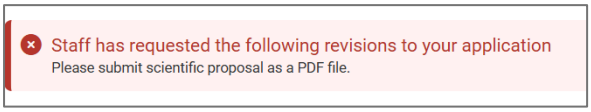
Revisions Requested

At both the ROI/LOI and full application stages, your application will be reviewed by TFRI. If revisions are required, TFRI will provide comments outlining the changes that need to be made. The system will notify you when revisions have been requested.

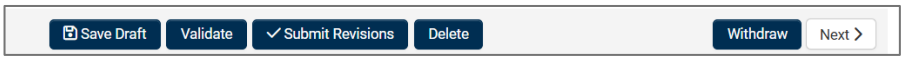
You will receive an email notification advising you that revisions are required. After logging into the system, navigate to **Revisions Requested** tab on the **Home** page to view applications that require updates.



Within the application, a notification flag will appear at the top of the page, alerting you to the section(s) requiring attention. Review the comments, make the necessary updates, and save your changes as needed.

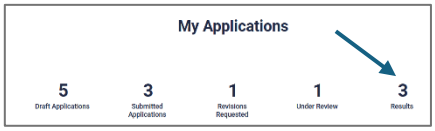


Once all requested revisions have been completed, select **Submit Revisions** to resubmit your application for review.



Results

Once the review process is complete, applicants will be notified of the funding decision by email from a TFRI staff member.



To view the outcome of your application and access reviewer comments, log in to TFT and navigate to the **Results** section. Reviews and funding decision information will be made available in this section after the review process has been finalized.

If your application is successful, the funded project will also appear under **My Funded Projects** in the **Approved Projects** section. From this section, you can access and manage your funded award and complete any required post-award activities.

Tips

Save Frequently

Saving your work is essential. The system does **not** provide warnings about unsaved changes before you log out or leave your application. To avoid losing information, save your work frequently throughout the application process.

It is recommended that you save:

- Within the application record as you complete sections.
- Budget worksheets before closing them.
- After uploading a document. A successfully uploaded document may appear on screen; however you must save the application record for the document to be retained in your application.
- After making updates to your profile or application.

Other Quick Tips

- Hover over the information icon (?),  displayed throughout the system to view additional guidance and helpful tips.
- Fields marked with an asterisk (*) are required and must be completed before submission.
- Use the **Jump To** menu on the right side of the application to navigate directly to specific sections of the application.
- If required fields are missing when you attempt to submit your application, validation errors will be displayed at the top of the page. Select an error message to be taken directly to the field that requires attention.