



Canada Council
for the Arts

Conseil des arts
du Canada

Key Changes About the Portal

E-INT-002

Last updated March, 2025



Bringing the arts to life
L'art au cœur de nos vies

Overview

This course helps existing users transition to the updated portal by highlighting key changes in terminology, navigation and processes.

Objectives

- Recognize key terminology changes in the updated portal
- Navigate the updated interface and locate new sections
- Identify improvements in how users browse and apply for funding
- Understand new features and updated processes
- Manage help requests through the new case management system

Key Terms and Concepts

The following table explains key terms used in this course.

Key Term	Definition
Funding opportunities	Previously called “program component” or “prize,” refers to a specific grant or prize offered by the Canada Council for the Arts
Applications and nominations	Previously called “applications,” includes all submitted requests for grants or prize nominations
Funding awards	Previously called “successful applications,” refers to grants and funds that have been approved and awarded
Home	Previously called “dashboard.” The main landing page with quick access to key sections
Case management	A system that allows users to submit, track and manage support requests directly through the portal

Table of Contents

MODULE 1 – NAVIGATION & USER INTERFACE ENHANCEMENTS

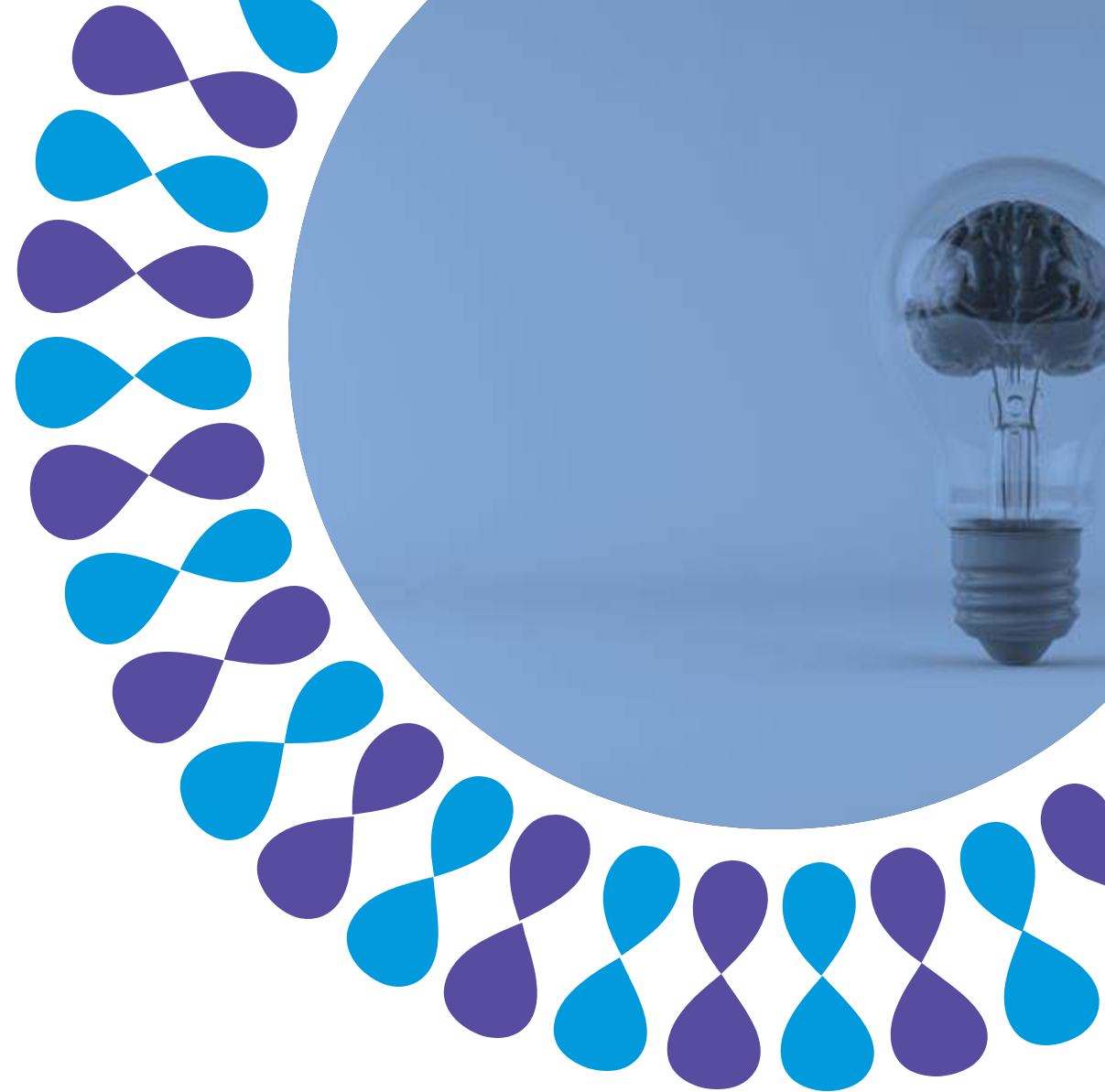
- 1.1 Home Page layout & shortcuts
- 1.2 Simplified navigation
- 1.3 Payment info registry
- 1.4 Assessor access

MODULE 2 – PROCESS IMPROVEMENTS

- 2.1 Simplified application process
- 2.2 Applications and funding awards
- 2.3 New case management system

1. Navigation & User interface enhancements

- 1.1 Home page layout & shortcuts
- 1.2 Simplified navigation
- 1.3 Help case management
- 1.4 Payment info registry
- 1.5 Assessor access



1.1 Home page layout & shortcuts

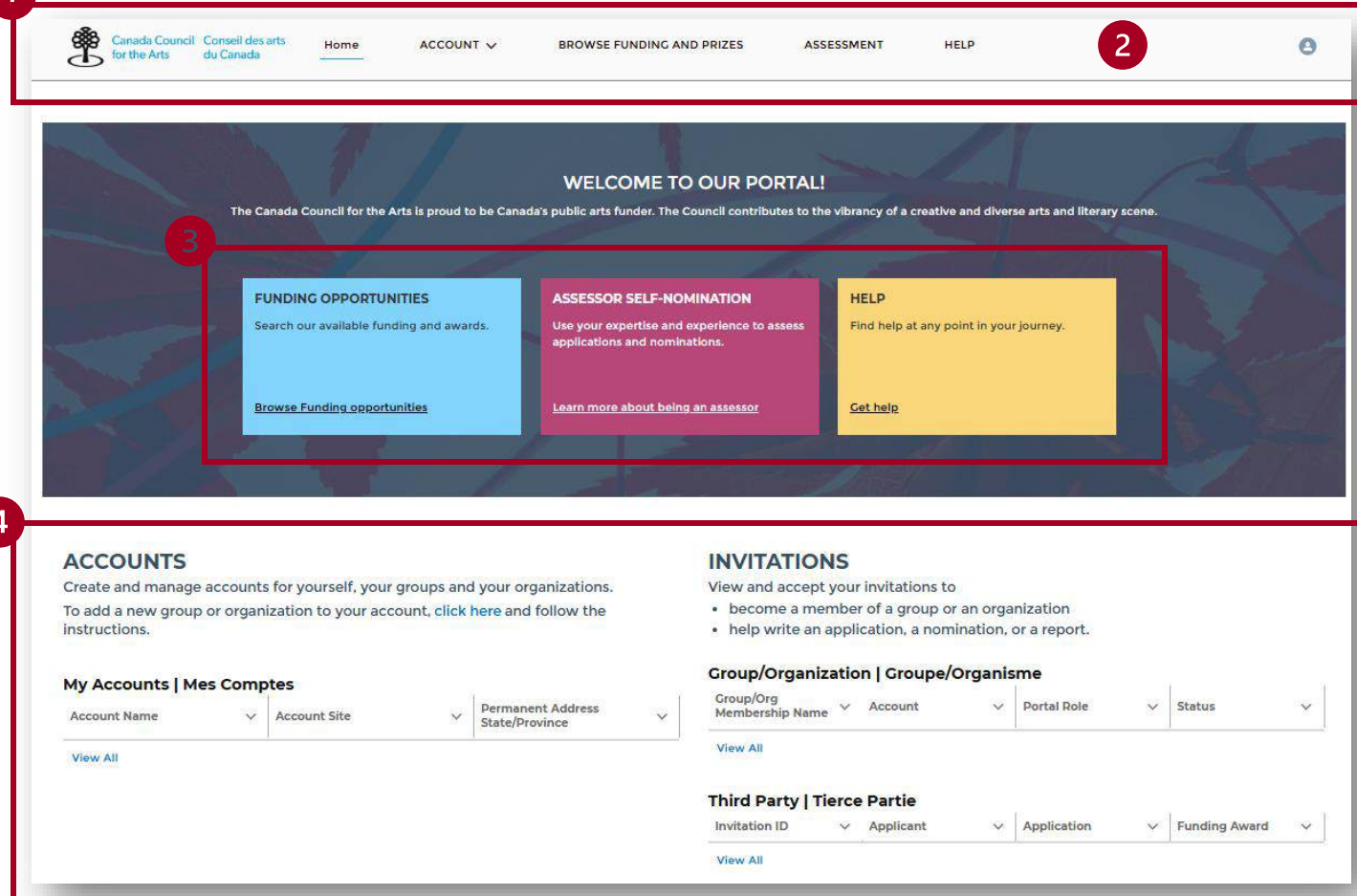
- The updated client portal introduces a redesigned home page that improves usability and provides quicker access to key areas. This section highlights the most noticeable layout and shortcut changes, helping returning users understand where to find what they need in the updated interface.

Key Points

- Streamlined Layout
- Section Previews

1.1 Homepage layout & shortcuts

Streamlined layout



- 1 Simplified top menu: Clearer, more intuitive navigation with useful, task-focused links
- 2 **Inbox** removed
All notifications are now sent directly by email
- 3 **Quick Access tiles**
Prominent links to **Funding Opportunities**, **Assessor Nomination**, and **Help**
- 4 Section previews
Organized blocks with quick info and direct access to each section

1.1 Homepage layout & shortcuts

Section Previews

The screenshot displays the homepage layout with five numbered callouts:

- 1 ACCOUNTS**: Create and manage accounts for yourself, your groups and your organizations. To add a new group or organization to your account, [click here](#) and follow the instructions.
My Accounts | Mes Comptes
Account Name | Account Site | Permanent Address, State/Province
[View All](#)
- 2 INVITATIONS**: View and accept your invitations to:
 - become a member of a group or an organization
 - help write an application, a nomination, or a report.
Group/Organization | Groupe/Organisme
Group/Org Membership Name | Account | Portal Role | Status
[View All](#)
Third Party | Tierce Partie
Invitation ID | Applicant | Application | Funding Award
[View All](#)
- 3 APPLICATIONS AND NOMINATIONS**: Submit, manage and track your applications and nominations. View your most recent drafts. To see your complete list of drafts, click [View All](#). You can find all active submissions and application history in your account, or in the relevant group or organization account.
My Accounts | Mes Comptes
Application ID | Application Name | Applicant | Status
[View All](#)
- 4 FUNDING AND AWARDS**: Accept, decline and report on your awarded funds. View your offers and active awards. To see your complete list of offers and active awards, click [View All](#). You can find all active awards and award history in your account, or in the relevant group or organization account.
My Accounts | Mes Comptes
Name | Award Number | Account | Status
[View All](#)
- 5 CASES**: Manage and track a case with our support team. A case is used to interact with the Council to ask questions, resolve issues or complete tasks. View your active cases. To see your complete list of active cases, click [View All](#). You can find all active and resolved cases in your account, or in the relevant group or organization account.
Open Cases | Requêtes Ouvertes
Case Number | Account Name | Last Modified Date | Status
[View All](#)
ASSESSMENT GROUPS
Evaluate applications and nominations as an assessor.
Active Groups | Groupes Actifs
Assessor Assignment # | Number Of Applications | Score Submission Due Date | Status
[View All](#)

- 1** Simplified top menu: Clearer, more intuitive navigation with useful, task-focused links
- 2** New **Invitations** section
Centralized view of group, organization, third-party and assessment invitations
- 3** Applications and nominations
View, submit, manage and track your applications and nominations
- 4** Funding awards
Accept, decline, view and report on your awarded funding
- 5** Cases
Manage and track a case with our support team. Assessment committees assess applications and nominations as assessors

1.2 Simplified navigation

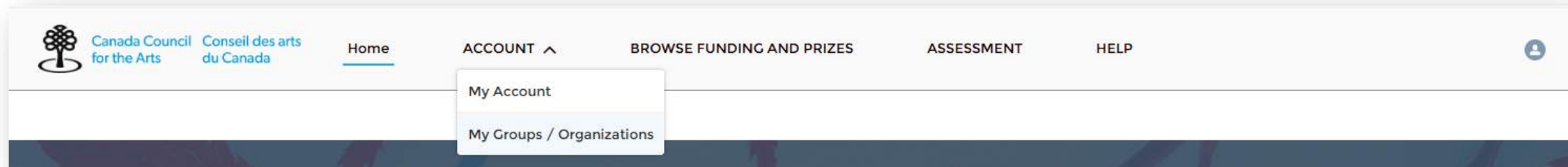
- The updated portal introduces a simplified, user-centered navigation structure. Menu items and page layouts have been redesigned to help users move more efficiently between key sections. This section highlights how the navigation experience has improved, making it easier to locate and access information.

Key points

- Task-oriented top menu
- Consolidated account management
- **Quick Access** side panels
- Simplified browsing of funding and prizes

1.2 Simplified navigation

Task-oriented top menu



The new top Menu is organized around user tasks to provide quick access to your accounts, funding, assessment and support.

Important information about accounts, applicants, applications and support cases is directly accessible through the section previews on the homepage, making navigation faster and more intuitive.

Note: Only users who have self-nominated as an assessor will see the assessment tab in the menu.

1.2 Simplified navigation

Consolidated account management

My Account
Thomas Holmes Demo

Self-Nominate as Assessor Add Group/Organization

Details Self-ID Granting Eligibility Payment

DETAILS

Please keep this important information up to date. It ensures that we are able to connect with you when needed.

Account Details

Account Name Thomas Holmes Demo Alias

Preferred Language English Pronouns He/Him

Principle Artistic Practice Business Name

GST/HST account number 123456789

Citizenship & Year of birth

Citizenship Status Canadian Citizen Year of Birth

Contact Information

Related Accounts (1)

Account Name	Account Record Ty...
Holmes'Org	Organization

View All

Groups/Org Memberships (0)

Applications (2)

Applic...	Applica...	Date S...	Applica...
IA-00...		2025-0...	Submit...
IA-00...		2025-0...	Submit...

View All

Funding Awards (0)

Accounts are now under one main **My Account** page, organized into tabs.

All personal details like:

- Account details
- Self-identification
- Applicant profile
- Payment information

1.2 Simplified navigation

Quick Access side panels

The screenshot shows the 'My Account' page for 'Thomas Holmes Demo'. The page has a top navigation bar with 'My Account' and 'Thomas Holmes Demo' (underlined). To the right of the name are two buttons: 'Self-Nominate as Assessor' and 'Add Group/Organization'. Below the navigation bar are four tabs: 'Details' (selected), 'Self-ID', 'Granting Eligibility', and 'Payment'. The main content area is divided into two sections. The left section is titled 'DETAILS' and contains a message: 'Please keep this important information up to date. It ensures that we are able to connect with you when needed.' Below this are three expandable sections: 'Account Details', 'Citizenship & Year of birth', and 'Contact Information'. The 'Account Details' section is expanded, showing fields for 'Account Name' (Thomas Holmes Demo), 'Preferred Language' (English), 'Principle Artistic Practice', 'Alias', 'Pronouns' (He/Him), 'Business Name', and 'GST/HST account number' (123456789). The right section is a sidebar with four panels: 'Related Accounts (1)', 'Groups/Org Memberships (0)', 'Applications (2)', and 'Funding Awards (0)'. The 'Related Accounts (1)' panel shows a table with columns 'Account Name' and 'Account Record Ty...'. The first row shows 'Holmes'Org' and 'Organization'. The 'Applications (2)' panel shows a table with columns 'Applic...', 'Applica...', 'Date S...', and 'Applica...'. The first two rows show 'IA-00...' and '2025-0...' with 'Submit...' buttons. The sidebar panels are highlighted with a red border.

My Account
Thomas Holmes Demo

Self-Nominate as Assessor Add Group/Organization

Details Self-ID Granting Eligibility Payment

DETAILS

Please keep this important information up to date. It ensures that we are able to connect with you when needed.

▼ Account Details

Account Name Thomas Holmes Demo Alias

Preferred Language English Pronouns He/Him

Principle Artistic Practice Business Name

GST/HST account number 123456789

▼ Citizenship & Year of birth

Citizenship Status Canadian Citizen Year of Birth

▼ Contact Information

Related Accounts (1)

Account Name	Account Record Ty...
Holmes'Org	Organization

View All

Groups/Org Memberships (0)

Applications (2)

Applic...	Applica...	Date S...	Applica...
IA-00...		2025-0...	Submit...
IA-00...		2025-0...	Submit...

View All

Funding Awards (0)

The **My Account** page displays helpful panels on the right for fast navigation to:

- related Accounts
- groups/org memberships
- applications
- funding awards
- cases

These panels are visible across several sections, making it easier to jump between related information.

1.2 Simplified navigation

Simplified browsing of funding and prizes

The screenshot displays the 'FUNDING OPPORTUNITIES' page. On the left, a 'Search and Filter' sidebar (marked with a red circle 1) contains various filters: 'Funding For' (All), 'Funding Opportunity Type' (Grant, Prize), 'Applicant Profile' (All), 'Information on applicant profiles' (Status: Open, Closed, Suspended), 'Information on status' (Activity: All), and 'Artistic Practice' (All, First Nations, Inuit, Metis, Official language minority communities). A 'Reset filter' link and an 'Apply filters' button are also present. The main content area shows a grid of opportunity tiles (marked with a red circle 2). Each tile includes a title, a status tag (e.g., 'Closed', 'Suspended', 'Open'), a brief description, and a 'Learn More' button. The tiles are categorized by type: 'GRANT' and 'PRIZE'. A 'Total: 22' and a 'Sort by:' dropdown are at the top right. A red circle 3 highlights the 'PRIZE' tile for 'Arts Festivals and Presenters'.

- 1 New filter options
Easily narrow results by opportunity type, applicant profile, artistic practice and status.
- 2 Simplified opportunity display
Opportunities now appear as visual tiles with key information, status tags (open, closed, suspended) and quick "learn more" links
- 3 Inclusion of prizes in **Funding Opportunities**
Prizes are now listed alongside grants in the **Funding Opportunities** page, allowing users to browse all opportunities in one place

1.3 Payment information registry

- The updated portal introduces a secure **Payment** section where users can directly enter their banking information for direct deposit payments. This new feature improves security, gives users greater control over their payment information and streamlines the disbursement process for grant payments and assessor fees.

1.3 Payment information registry

Secure payment information management

My Account
Thomas Holmes Demo

Self-Nominate as Assessor Add Group/Organization

Details Self-ID Granting Eligibility **Payment**

Bank Details (3) 1

Page 1 | Showing records 1 to 3 of 3

Nickname	Payment Method	Active for Granting	Active for Assessor Pay...
Demo Cheque	Cheque		
Demo Direct Deposit	Direct Deposit	✓	
Demo Wire Transfer	Wire Transfer		

Prev Next

Payments (0) 4

Page 1 | Showing records 1 to 0 of 0

Prev Next

Related Accounts (1)

Account Name	Account Record Ty...
Holmes'Org	Organization

View All

Groups/Org Memberships (0)

Applications (2)

Applic...	Applica...	Date S...	Applica...
IA-00...		2025-0...	Submit...
IA-00...		2025-0...	Submit...

View All

Funding Awards (0)

Cases (6)

Case	Category	Status
------	----------	--------

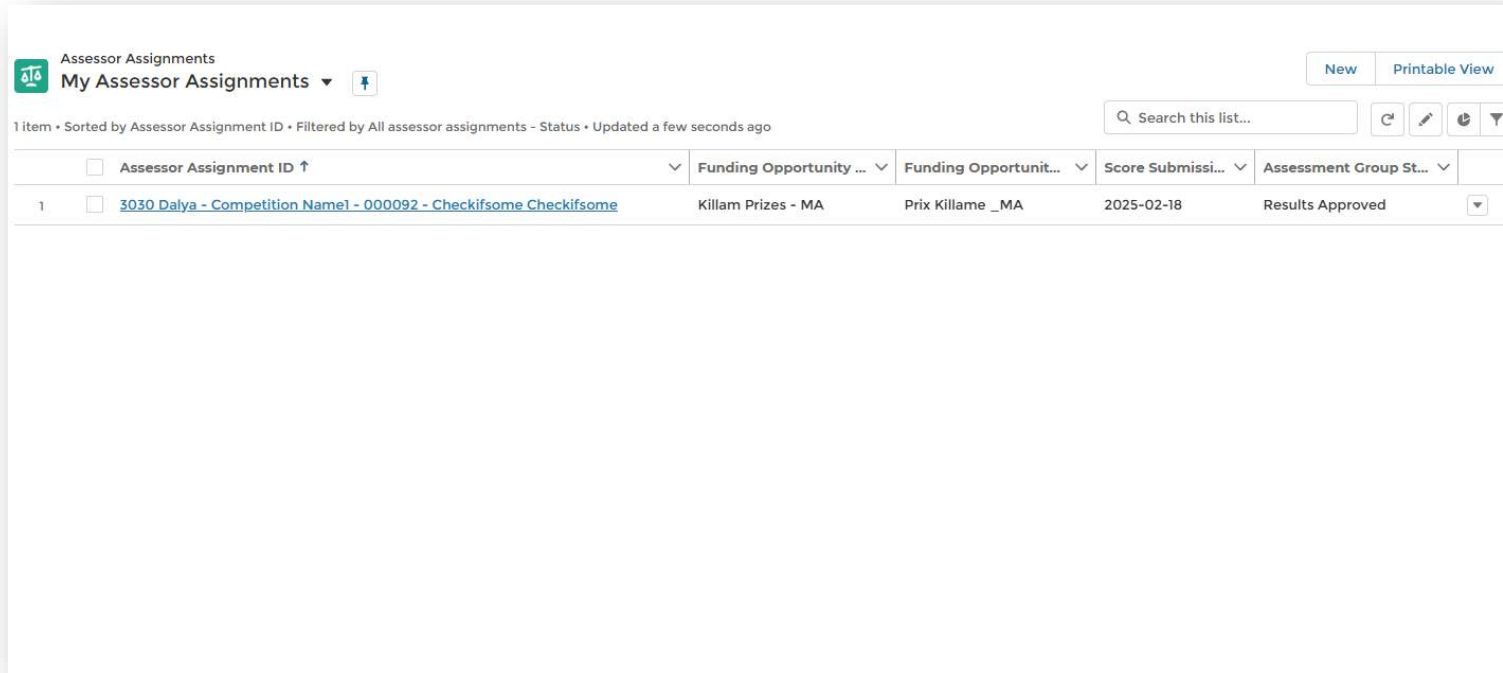
- 1 Multiple bank accounts
Supported users can add more than one bank account if needed (e.g., one for grants, another for assessor fees).
- 2 Payment method
Users can specify the payment method (cheque, direct deposit, or wire transfer) for each account
- 3 Account selection for payments
Users can select which bank account to use for grants and/or assessor fees
- 4 Payment history
Users can view a record of their completed payments directly in the portal

1.4 Assessor access

- The updated portal now includes a dedicated **Assessment** section, allowing assessors to review and score applications directly within the portal. In the previous system, assessors had to use a separate third-party platform. This integration streamlines the assessment process, improves security and centralizes all tasks in one place.

1.4 Assessor access

Assessor assignments overview



The screenshot shows a web interface for 'Assessor Assignments'. At the top, there's a header with 'Assessor Assignments' and 'My Assessor Assignments' with a dropdown arrow. To the right are 'New' and 'Printable View' buttons. Below the header, a status bar indicates '1 item • Sorted by Assessor Assignment ID • Filtered by All assessor assignments - Status • Updated a few seconds ago'. A search bar 'Search this list...' is on the right. The table has five columns: 'Assessor Assignment ID', 'Funding Opportunity', 'Funding Opportunity', 'Score Submissi...', and 'Assessment Group St...'. The first row shows an assignment with ID '3030 Dalya - Competition Name1 - 000092 - Checkifsome Checkifsome', 'Killam Prizes - MA', 'Prix Killame _MA', '2025-02-18', and 'Results Approved'.

<input type="checkbox"/> Assessor Assignment ID ↑	Funding Opportunity ...	Funding Opportunit...	Score Submissi...	Assessment Group St...
1 <input type="checkbox"/> 3030 Dalya - Competition Name1 - 000092 - Checkifsome Checkifsome	Killam Prizes - MA	Prix Killame _MA	2025-02-18	Results Approved

Assessors can now view all their assigned programs directly from the portal. For each assignment, they can see:

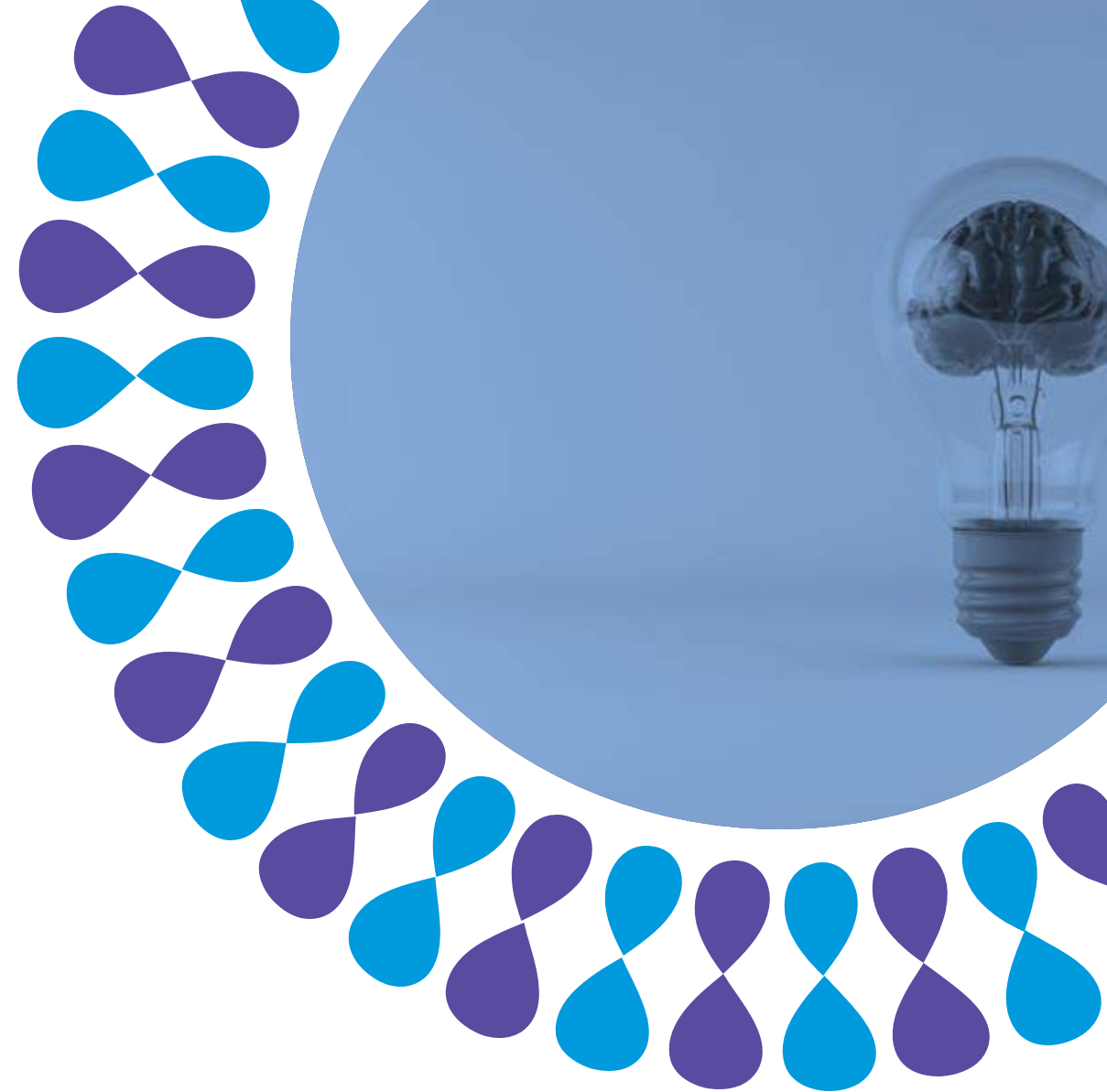
- The funding opportunity they are assessing
- The number of applications to review
- The due date for submitting their scores
- The status of the assessment group

2. Process improvements

2.1 Simplified application process

2.2 Applications and funding awards

2.3 New Case management system



2.1 Simplified application process

The portal removes the previous requirement to have profiles validated before applying for funding.

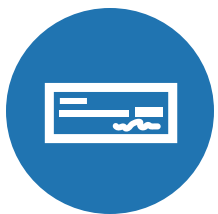
- Users can now create or update their applicant profile and immediately begin working on applications. This change eliminates delays caused by waiting for profile validation and streamlines the path to submitting applications.

2.1 Simplified application process



No more "validation block"

Users no longer have to wait for applicant profiles to be reviewed and validated before starting and submitting an application.



Create and apply simultaneously

Users can create or update their applicant profile while browsing and applying for funding opportunities.



Validation still happens

Profile validation will still occur later in the process, but it no longer blocks application submission.

2.2 Applications and funding awards

- In the portal, applications and funding awards are now managed as separate records.
- Previously, information about the award and the original application were combined. Now, when an application is successful, a separate funding award record is created.

2.2 Applications and funding awards

This allows users to:



track the status of their original application independently from the award



view and manage their awarded funds (accept offers, submit reports) directly from the **Funding Awards** section



access a clearer history of their applications and awards over time

2.2 Applications and funding awards

- Users can easily view their **Applications and Nominations** and **Funding and Awards** directly from the home page with **Quick Access** and related actions through the section previews.

APPLICATIONS AND NOMINATIONS

Submit, manage and track your applications and nominations.

View your most recent drafts. To see your complete list of drafts, click [View All](#). You can find all active submissions and application history in your account, or in the relevant group or organization account.

My Accounts | Mes Comptes

Application ID	Application Name	Applicant	Status
----------------	------------------	-----------	--------

[View All](#)

FUNDING AND AWARDS

Accept, decline and report on your awarded funds.

View your offers and active awards. To see your complete list of offers and active awards, click [View All](#). You can find all active awards and award history in your account, or in the relevant group or organization account.

My Accounts | Mes Comptes

Name	Award Number	Account	Status
------	--------------	---------	--------

[View All](#)

2.3 New: Case management

The updated portal includes an integrated case management system. Users can submit help requests, track the status of their cases, and view all support communications directly within the portal. Related help articles are also available to answer common questions without needing to submit a case.

Key topics

- Submit inquiries and access related help articles
- Track and view support requests

2.3 New Case management

Submit inquiries



1

HELP - LOG A CASE

* I need help with..

-- none selected --

Account

Search Accounts...

* Subject

* Description

Permitted file extensions are: .pdf, .doc, .docx, .txt, .text, .jpg, .jpeg, .png, .bmp, .mp3, .mp4

Attach file

Upload Files Or drop files

Submit

2

- 1 Submit inquiries**
Submit help requests directly through the portal. Users can select the topic and link their inquiry to a specific account.
- 2 Attach files to inquiries**
Upload documents or supporting materials when submitting a case for faster and clearer assistance.

2.3 New Case management

Track and view support requests

CASES

Manage and track a case with our support team. A case is used to interact with the Council to ask questions, resolve issues or complete tasks.
View your active cases. To see your complete list of active cases, click View All. You can find all active and resolved cases in your account, or in the relevant group or organization account.

OPEN CASES | REQUÊTES OUVERTES

Case Number	Name	Last Modified Date	Status
00001271	Dalya ZZ Person_QA_Portal1 Mrs.	2025-06-03, 11:45 a.m.	Open
00001178	Dalya_Group_Test Account 1	2025-06-03, 11:45 a.m.	Open
00001287	Dalya ZZ Person_QA_Portal1 Mrs.	2025-05-01, 2:51 p.m.	
00001286	Dalya ZZ Person_QA_Portal1 Mrs.	2025-05-01, 2:09 p.m.	
00001279	Dalya ZZ Person_QA_Portal1 Mrs.	2025-04-14, 2:22 p.m.	

[View All](#)

You can view and track submitted cases from the homepage previews. You can monitor the status of each case, check the date of the last update and access both active and resolved cases through your account or your group or organization account.

Canada Council for the Arts | Conseil des arts du Canada

HOME ACCOUNT BROWSE FUNDING AND PRIZES ASSESSMENT HELP

Cases

MY CASES

12 items - Sorted by Case Number - Filtered by All cases

Search this list...

Case Number	Name	I need help with	Category	Subject	Last Modified Date	Status
00001287	Dalya ZZ Person_QA_Portal1 Mrs.	Application	Applicant & project eligibility	Dalya - testing CGMSCBU...	2025-05-01, 2:51 p.m.	Escalated
2 00001286	Dalya ZZ Person_QA_Portal1 Mrs.	Account	Account information	Uploading Multiple files e...	2025-05-01, 2:09 p.m.	Escalated
3 00001279	Dalya ZZ Person_QA_Portal1 Mrs.	Account	Login	Having Issues with login	2025-04-09, 3:45 p.m.	Waiting for
4 00001278	Dalya ZZ Person_QA_Portal1 Mrs.	Funding Award	Funding acceptance	This does not match	2025-04-14, 2:22 p.m.	Escalated
5 00001274	Dalya ZZ Person_QA_Portal1 Mrs.	Other	General Information about Can...	test case - Some Errors ap...	2025-04-14, 10:22 a.m.	Escalated
6 00001272	Dalya ZZ Person_QA_Portal1 Mrs.	Application	Application/Prize Forms	Follow up on my account ...	2025-04-11, 4:15 p.m.	Escalated
7 00001271	Dalya ZZ Person_QA_Portal1 Mrs.	Account	Login	Subject Inquiry About Elig...	2025-06-03, 11:45 a.m.	Open
8 00001265	Dalya ZZ Person_QA_Portal1 Mrs.	Account	Application Assistance (for app...		2025-05-20, 2:06 p.m.	Open
9 00001264	Dalya_Group_Test Account 5	Account	Login		2025-03-25, 1:18 p.m.	Escalated
10 00001261	Dalya_Group_Test Account 1	I want to update/access my ac...	Account information		2025-02-17, 9:04 a.m.	Escalated
11 00001260	Dalya_Group_Test Account 1	I want to update/access my ac...	Login	Subject Inquiry About logi...	2025-05-23, 6:13 a.m.	Closed
12 00001178	Dalya_Group_Test Account 1	I need support for my applicat...	Application form		2025-06-03, 11:45 a.m.	Open

Conclusion

The updated portal offers a more streamlined, intuitive experience.



Canada Council
for the Arts

Conseil des arts
du Canada

Thank you!

