

USER GUIDE

HOW TO NAVIGATE **Dialogue**

FEBRUARY 2022

TELEFILM PARTENAIRE
CANADA DE
CHOIX

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GENERAL INFORMATION AND ENROLMENT

Welcome to the Dialogue User Guide!

All Telefilm programs are administered via Dialogue, an electronic platform that is **accessible from all electronic devices** and that centralizes all tasks and communications related to the application process.

Use this guide to learn the basic step-by-step instructions to help you navigate the Dialogue platform.

DIALOGUE ACCOUNT CREATION

- 1) To create a Dialogue account, go to Telefilm Canada's [website](#), under **Log in**. Click on **Create an account**:

TELEFILM CANADA PARTNER OF CHOICE FINANCING - COPRODUCTION - FESTIVALS AND MARKETS - INDUSTRY ENGAGEMENT - COVID-19

1 Log in FR Q

Dialogue

Log in

Submit or access an application online

You have a Dialogue account **2 You are a new client**

Log in Create an account

- 2) Fill out the first name, last name, and email fields. After acknowledging that you are not a robot, click on **Create Account**:

Home > Log in > Applying for a Dialogue account

Applying for a Dialogue account

First Name Last Name

Email

☐ I'm not a robot

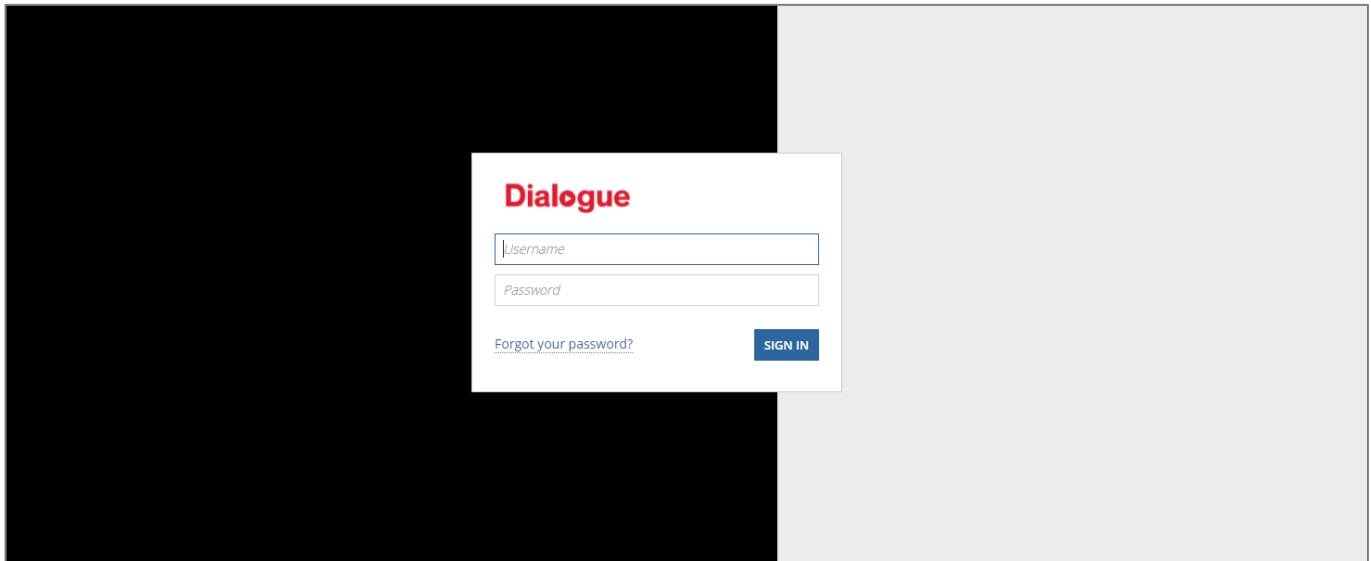
2CAPTCHA Privacy Terms

Create account

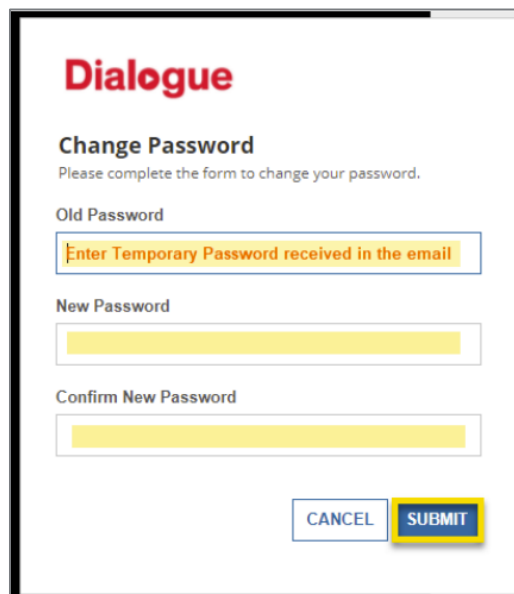
Share

Applying for a Dialogue account

- 3) An email will be sent to you with an activation link and temporary password. When you receive the email, click on the link to go to the Dialogue login page

A screenshot of the Dialogue login page. The page has a dark background on the left and a light gray background on the right. A white login box is centered on the dark background. The box contains the Dialogue logo in red, a Username input field, a Password input field, a link for 'Forgot your password?', and a blue 'SIGN IN' button.

- 4) At the login page, enter your **email address** as **username** and the temporary password that was sent to you by email. You will be prompted to choose a new password.

A screenshot of the Dialogue 'Change Password' page. The page is white with a black border. It features the Dialogue logo in red, the title 'Change Password', and a subtext 'Please complete the form to change your password.' Below this are three input fields: 'Old Password' with a placeholder 'Enter Temporary Password received in the email', 'New Password', and 'Confirm New Password'. At the bottom right are two buttons: 'CANCEL' and 'SUBMIT'.

- 5) Once you have logged in to your account, go to the **Tasks** menu to complete the task and **Accept the Terms and Conditions**.

Enrolment questions and technical support – please email enr@telefilm.ca

CREATE AN ORGANIZATION

- 1) To be able to submit new applications or work on existing applications, you will need to either create a new organization or be added as a member to an existing organization by the administrator of that organization.
- 2) To add a new organization in Dialogue, go to the **Actions** menu of your Dialogue account and select the option **Create an organization**:

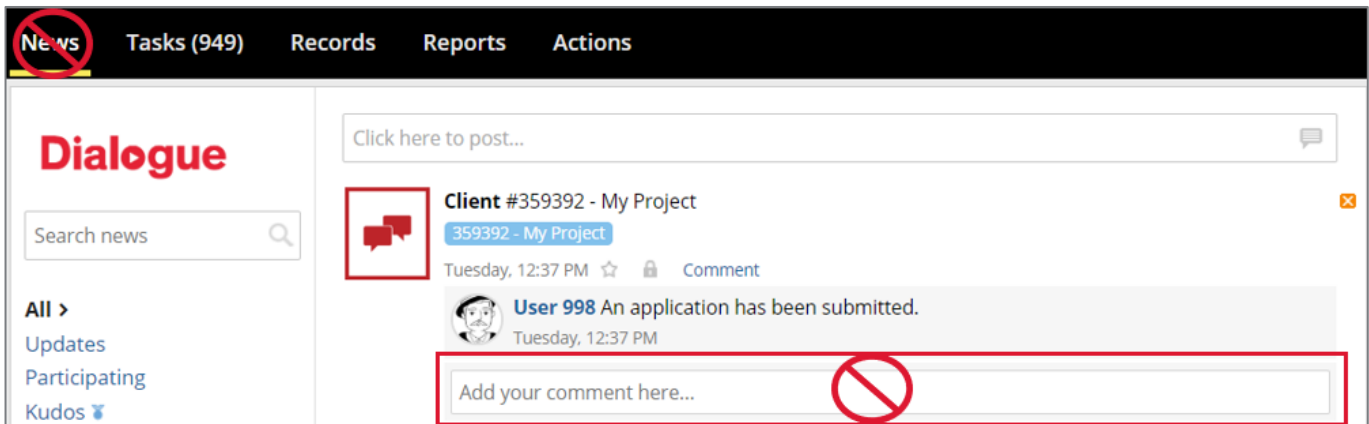


- 3) Fill in the requested information and click on **Submit**. Once that is done, you will be a member of the organization.
 - 4) If you would like to be added as a member to an organization that already exists in Dialogue you can contact the administrator of the organization and ask them to add you as a member.
- **Note** – You can be a member of multiple organizations with the same member account/username.

You will not be able to submit an application unless you have an Organization in your account.

Quick tips once your organization is set up in Dialogue

- **DO NOT USE News** to communicate with us:



- Under **Records**, you will find folders such as **My Telefilm Applications** and **My Organizations**:

News Tasks (1,240) **Records** Reports Actions

Search record types... SEARCH

- Legal Statements | Énoncés légaux
Legal Statements | Énoncés légaux
- My Broadcaster Agreement Forms | Mes formulaires d'...
All my Broadcaster Agreement Forms | Tous mes formulair...
- My CMF Applications | Mes demandes FMC
List of my CMF applications | Liste de mes demandes FMC
- My CMF Audience Success Reports | Mes rapports de Su...
List of My CMF Audience Success Report reports | Liste de t...
- My CMF Exploitation Reports | Mes rapports d'exploitat...
A List of My CMF Production and Distribution Exploitation r...
- My CMF Metric Report (Gross Sales) | Mes rapports de ...
A List of My CMF Gross Sales Metric reports | Liste de tous ...
- My CMF Pre-Application Consultations | Mes consultati...
List of my CMF pre application consultations | Liste de tout...
- My Organizations | Mes Organisations
A list of the Organizations I am a Member of | Une liste des ...
- My Products | Mes Produits
List of Telefilm Products for which my organizations have a ...
- My Telefilm Applications | Mes Demandes Téléfilm
List of my Telefilm applications | Liste de mes demandes Té...
- My Telefilm Exploitation Reports | Mes rapports d'expl...
A List of My Telefilm Production and Distribution Exploitation...
- My Telefilm Metric Reports (Gross Sales) | Mes rapports...
A List of My Telefilm Gross Sales Metric reports | Liste de to...
- Users | Usagers
Directory of users | Répertoire des usagers

- Once in **My Organizations**, click on the **Legal Name** to open the Organization profile:

My Organizations | Mes Organisations

Search

Legal Name	ID	Type	Administrator	Resp?	Application	e-Sign	Organization Profile	Exploitation Reports	Broadcaster
<u>_1_Fitness corp</u>	300592	Company	Test FR Enroll NonPartner	Yes					

- Select **Details**, **Members**, **Documents** or **Defaults** to see the information related to those sections:

Records / My Organizations | Mes Organisations

_1_Fitness corp

ADD MEMBER MANAGE DOCUMENTS EDIT MEMBER PERMISSIONS

Summary Filmography News Related Actions

Details	Members	Documents	Defaults
✓	○	○	○

Organization Details

Legal Name _1_Fitness corp

Organization ID 300592
Validated ☒
Validation Date Oct 2, 2018
Validation Document Incorporation Document
CMF Default Dialogue
Telefilm Default Dialogue
TFC Other Default ☐
CMF Other Default ☐

ADD MEMBERS TO AN ORGANIZATION

- The administrator of an organization (or the member who created the organization if there is not yet an administrator for the organization) can add other members to the organization. To do so, they can follow the steps below:

- 1) The administrator (or creator) of the organization logs in to their Dialogue account
- 2) Go to the menu **Records/My organizations** and click on the company name to open the organization profile

- 3) Click on **Add member** at the top right of the organization profile
 - 4) Add the new member's email address and click on **Submit**
 - a. If the newly added member already has a Dialogue member account, they will receive a task to **Confirm their association to the organization**. Once they have completed that task, they will be a member of the organization and can work on existing applications and/or submit new applications on behalf of the organization, OR
 - b. If the newly added member doesn't already have a Dialogue member account, they will first receive an email with an activation link and temporary password. Once they have activated their account and completed the task to accept the terms and conditions of use for the account, they will then receive the task to confirm their association to the organization.
- **Note** - If an administrator would like to add more than one member to their organization or add a member to more than one organization, they will need to repeat the above steps for each organization and each member individually.

DESIGNATE AN ADMINISTRATOR TO AN ORGANIZATION

- The task to request administrator role is automatically sent to the member(s) of an organization when a project is moved to recommended status.
- If a member needs to be designated as administrator of their organization before the automatic task is sent or if an organization would like to designate more than one administrator or change administrators for their organizations, they can contact the enrolment team and request to have the task sent to them. To do so, you can email the enrolment team at enr@telefilm.ca and in the message please specify the name of the organization(s) as well as the name and email address of the member(s) to be designated as administrator.
- The enrolment Coordinators will send the task to "Request administrator role" to the members as requested. This task must be completed and submitted by the member who is assigned to the task. A member cannot submit the administrator task on behalf of another member.
- To be designated as administrator the member will need to:
- 1) Complete and submit the task to request administrator role: In the task the member will be asked to attach the 2 following documents:
 - a. The complete incorporation documents which include a list of directors/officers for the organization
 - b. The fully executed certificate of authorization signed by a director/officer of the organization. The template for the certificate of authorization is available to download via the link provided in the task. The following information needs to be added to the certificate of authorization
 - i. On page 1 paragraph 1, add the name of the director/officer who is authorizing the administrator designation and add the name of the company
 - ii. On page 1 paragraph 2, add the name of the member who will be designated as administrator of the organization
 - iii. On page 3, have the director/officer date and sign the document and add in block letters above the signature box the name of the company and below the signature box the name of the signatory (director/officer)
 - 2) Once the task to request administrator role has been received and validated by the enrolment team.
 - a. If the member already has a verified member account, the administrator rights will be assigned to them right away.
 - b. If the member doesn't already have a "verified" account, they will need to complete the identity verification step before the administrator rights can be assigned to them. The identity verification task is the last step in the administrator designation process. The identity verification must be completed by all members who wish to become administrator of their organizations in Dialogue. When the enrolment team receives confirmation from Sterling Backcheck that the identity verification has been completed successfully, the identity verification task is approved in Dialogue and the administrator rights are assigned to the member.

MODIFY A MEMBER'S PERMISSIONS

- ▶ In certain cases an administrator may want to modify their members permissions for certain types of activities without giving them full administrator access to the organization.
- ▶ To modify a member's permissions, the administrator can follow the steps below:
 - 1) Go to the menu **Records/My organizations** and click on the company name to open the organization profile
 - 2) In the organization profile, click on "edit member permissions" at the top right
 - 3) In the Edit permissions tool, select the member to be modified by clicking on the small box to the left of the line with the member's name. The member's current permissions will be displayed.
 - 4) The administrator can select the level of permissions from the dropdown menu for each category of permissions and click on "save change"
 - 5) The steps will need to be repeated for each member/organization to modify
- ▶ **Note** - The "esign" and "signature Threshold" functions are not yet available in Dialogue so there is no need to modify these permissions for any member.

HOW TO SUBMIT AN APPLICATION

- ▶ Prior to submitting your application, please make sure to familiarize yourself with the Telefilm Guidelines, Essential Information Guide and Resources available on the [Telefilm website](#).
- ▶ All downloadable Telefilm forms and templates required at application stage are also available on [Telefilm website](#).
- ▶ Before submitting your application, make sure to print a copy (or print to PDF). Once submitted, the application form will no longer be available as it will be under evaluation.

SUBMIT AN APPLICATION

- In Dialogue, go to **Actions** and choose **Submit an Application**:

The screenshot shows the Appian interface with the 'Actions' tab selected in the top navigation bar. On the left, there is a 'Dialogue' sidebar with a list of applications: BAF (1), CMF (1), Talent to Watch | Talents en vue (1), Telefilm (1), TFC Enrolment (1), and TFC Manage Exploitations (6). The main area displays a list of actions, each with a lightning bolt icon and a star. The action 'Submit an Application | Soumettre une demande' is highlighted with a red box and a yellow arrow pointing to it. Other actions include 'Canada Media Fund Payment', 'Create Broadcaster Agreement Form', 'Create Organization', 'Request a Preliminary Opinion About the Eligibility of a Project to the CMF', and 'Submit a Talent to Watch Project'.

- Select the **Telefilm Canada** entity, then the **Short-Term Compensation Fund 2022-2023** program and click **NEXT**:

The screenshot shows the 'Application' form in the Appian interface. The 'Entity' dropdown menu is open, and 'Telefilm Canada' is selected, highlighted with a red box and a yellow arrow labeled '1'. The 'NEXT' button is visible on the right side of the form.

The screenshot shows the 'Application' form with the 'Entity' dropdown set to 'Telefilm Canada'. The 'Program' dropdown menu is open, and 'Short-Term Compensation Fund 2022-2023' is selected, highlighted with a red box and a yellow arrow labeled '2'. Other programs listed include 'Theatrical Exhibition Program', 'Development Program', and 'Talent to Watch'. A 'CANCEL' button is visible on the left.

The screenshot shows the 'Application' form with the 'Entity' dropdown set to 'Telefilm Canada' and the 'Program' dropdown set to 'Short-Term Compensation Fund 2022-2023'. The 'Fiscal Year' is set to '2022-2023'. The 'NEXT' button is highlighted with a red box and a yellow arrow labeled '3'. A 'CANCEL' button is visible on the left.

COMPLETE APPLICATION

- In the **Applicant** section, select the applicant's company and the correspondence language.
- In the **Contact** section, add the contact information for the contact for all correspondence and contract signatory. Please ensure that the contact is a member of the applicant company (see **My Organizations** to confirm).

News Tasks (1,236) Records Reports **Actions**

Complete Application

Summary

Program Short-Term Compensation Fund 2022-2023 Application Year 2022-2023

▼ **Applicant**

If this information is incorrect, please contact enr@telefilm.ca

TEST COMPANY INC.

Correspondence Language

☐ English ☐ French

▼ **Contacts**

NEW

Contact Type	Pronoun	Name (last name, first name)	Email	Phone Number
Contact for all correspondence	--Select--			
Contract signatory	--Select--			

He/Him
She/Her
They/Them
Choose not to identify

- In the **Project** section, fill in all the fields related to the project (see details p.11).

News Tasks (1,236) Records Reports **Actions**

▼ **Project**

Title

Has this Project received production funding from Telefilm Canada or the Canada Media Fund?
☐ Yes ☐ No

If you answered "yes" to the previous question, please provide any previous title, application number and/or other comment.

Production Type

Language

If you answered "other" to the previous question, please specify the language.

Genre

Real Start Date of Principal Photography/Animation

Real End Date of Principal Photography/Animation

Start Date of Coverage by the STCF

End Date of Coverage by the STCF

Number of Canadian shoot days during the STCF coverage period

Number of non-Canadian shoot days during the STCF coverage period

Please confirm that the "Applicant" is the company producing the project (usually single purpose company not parent company). If not please modify the applicant name above.

Please select the statement(s) that correspond(s) to the Applicant and/or its Related Parties

Total Canadian Budget (CAD)

Is this a national coproduction?

If the answer is yes, please indicate the name(s) of the coproduction company(ies).

Is this an international coproduction governed by a treaty?

If the answer is yes, please indicate with which country(ies).

Has this application been covered by the STCF up to March 31, 2022?

Maximum coverage for an interruption (CAD)

Maximum coverage for an abandonment (CAD)

Project - Fields

1	Title	<input type="text"/>
2	Has this Project received production funding from Telefilm Canada or the Canada Media Fund? <input type="radio"/> Yes <input type="radio"/> No If you answered "yes" to the previous question, please provide any previous title, application number and/or other comment.	<input type="text"/>
3	Production Type	--Select--
4	Language If you answered "other" to the previous question, please specify the language.	--Select-- <input type="text"/>
5	Genre	<input type="text"/>

6	Real Start Date of Principal Photography/Animation ?	<input type="text" value="mm/dd/yyyy"/>
7	Real End Date of Principal Photography/Animation ?	<input type="text" value="mm/dd/yyyy"/>
8	Start Date of Coverage by the STCF ?	<input type="text" value="mm/dd/yyyy"/>
9	End Date of Coverage by the STCF ?	<input type="text" value="mm/dd/yyyy"/>
10	Number of Canadian shoot days during the STCF coverage period ?	<input type="text"/>
11	Number of non-Canadian shoot days during the STCF coverage period	<input type="text"/>

12	Please confirm that the "Applicant" is the company producing the project (usually single purpose company not parent company). If not please modify the applicant name above. <input type="radio"/> Yes <input type="radio"/> No	
13	Please select the statement(s) that correspond(s) to the Applicant and/or its Related Parties <input type="checkbox"/> Company majority owned and controlled by individuals who self-identify as Black or People of Colour <input type="checkbox"/> Company majority owned and controlled by 2SLGBTQIA+ persons <input type="checkbox"/> Company majority owned and controlled by persons with disabilities <input type="checkbox"/> Company majority owned and controlled by Indigenous persons (First Nations, Inuit/Inuk or Métis) <input type="checkbox"/> Company majority owned and controlled by women <input type="checkbox"/> Company majority owned and controlled by members of an Official Language Minority Community <input type="checkbox"/> None of the above <input type="checkbox"/> Choose not to identify	
14	Total Canadian Budget (CAD)	<input type="text"/>
15	Is this a national coproduction? <input type="radio"/> Yes <input type="radio"/> No If the answer is yes, please indicate the name(s) of the coproduction company(ies).	<input type="text"/>
16	Is this an international coproduction governed by a treaty? <input type="radio"/> Yes <input type="radio"/> No If the answer is yes, please indicate with which country(ies).	<input type="text"/>
17	Has this application been covered by the STCF up to March 31, 2022? <input type="radio"/> Yes <input type="radio"/> No	
18	Maximum coverage for an interruption (CAD)	<input type="text"/>
19	Maximum coverage for an abandonment (CAD)	<input type="text"/>

Description

1. Ensure complete title matches the Insurance documents and Pre-Eligibility Attestation including season numbers and/or episodes.

2. If yes, please include the fund/program and the relevant Dialogue numbers in the box.

3. Select from the drop-down menu.

4. If the language of your project is not in the drop-down list, select *other* and add the language in the box below.

5. Please identify the genre (ie. documentary, youth, fiction, etc.).

6. Insert the day principal photography will start **OR** the date it started if it has already begun.

7. Insert the scheduled end date of principal photography even if the shoot continues beyond March 31, 2023

8. Insert the date you are applying for STCF coverage. This must be the first day of principal photography or the beginning of a scheduled block.

9. Insert the end date of coverage. This must be the last day of principal photography or the end of a specific block of production and cannot extend beyond March 31, 2023.

10. List the anticipated number of actual shooting days scheduled to take place in Canada.

11. List the anticipated number of actual shooting days scheduled to take place outside Canada. **Note:** the STCF does not cover filming outside of Canada.

12. Ensure the applicant company is not a parent company of a group of companies but the company responsible for this production. The STCF Pre-eligibility agreement will be issued to this company, as well as any indemnity payment in the event of an eligible claim.

13. Select from the boxes provided.

14. Ensure the budget is in Canadian dollars and is the final, locked budget amount for the project.

15. If yes, please add the legal company name of the national co-production partner's organization.

16. If yes, please add the name of the country.

17. If this project had a signed STCF Pre-Eligibility Agreement for coverage last year, please select YES.

18. The maximum coverage amount for interruptions automatically calculated as specified in the STCF guidelines.

19. The maximum coverage amount for abandonment is automatically calculated as specified in the STCF guidelines.

- ▶ In the **Required Documents** section, click **+Add** to begin uploading a required document.

▼ **Required Documents** ←

The maximum file size allowed is 25MB. Documents too large are highlighted in red

Document	Website URL	Description	Type
No items available			

+Add

- ▶ In order to upload and name all required documents correctly, please refer to the list of **required documents** listed in the [Guidelines](#) (Section 4) and on the [Attestation Form](#) (p.3).

▼ **Required Documents** ←

The maximum file size allowed is 25MB. Documents too large are highlighted in red

Document	Website URL	Description	Type
STCF_DOC_TEST.DOCX - <1 KB		Pre-eligibility Attestation	--Select-- Decision Summary Default Information Director's vision and intentions DVD or Video Eligibility Form Emails

+Add

- ▶ Upload each required document separately.
- ▶ You cannot delete previously submitted documents.
- ▶ When the application form is finalized, please read the **Applicant Statement** and check the box. All fields must be completed in order to successfully submit the application.
- ▶ Then click **SUBMIT**:

Statement

1

Statement

☒ By checking this box, the Applicant declares having read the [Applicant Statements](#) and acknowledges that these statements are accurate, true and complete.

CANCEL

2

SUBMIT SAVE

News Tasks (1,237) Records Reports Actions

Start Date of Coverage by the STCF 04/01/2022

End Date of Coverage by the STCF 05/20/2022

Number of Canadian shoot days during the STCF coverage period 36

Number of non-Canadian shoot days during the STCF coverage period 0

▼ **Required Documents**

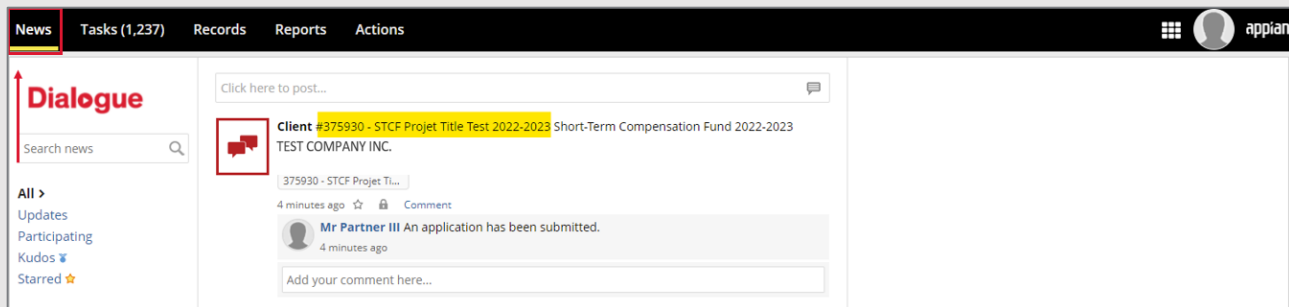
Before submitting your application, please make sure all the required documentation has been uploaded according to the Required Documents Checklist. We encourage you to read the list carefully. If you have any questions prior to submission, please contact our coordination team at 1-800-567-0890. Do you wish to continue?

NO YES

- ▶ Once you click **Submit**, a confirmation that the application has successfully been submitted will appear. Your **confirmation number** will appear at the top of the page:



- ▶ If you do not see the message confirming that the application was successfully submitted, this means that errors or incomplete fields remain (scroll up and look for the section(s) in red). Correct the errors and incomplete fields and click Submit again.
- ▶ The application #, title, funding stream and status appear under **News** and will be available for reference under **Records - My Telefilm Applications**.



MANAGING TASKS AND COMMUNICATING WITH TELEFILM

- ▶ Your Coordinator or Analyst will initiate a communication with you once they have reviewed the submitted application.
- ▶ If you would like to contact us and are unsure of your Coordinator or Analyst's name and email address, please email covid-19@telefilm.ca for assistance.
- ▶ **DO NOT USE NEWS.** Communication between you and the Coordinator or Analyst should be done, whenever possible, via Dialogue, through **Tasks** and **Notifications**.
- ▶ Communication via the task **Request Information** allows the Coordinator or Analyst to send you a list of questions. You will have to respond to each of the questions.
- ▶ Communication via the task **Complete Application** allows the Coordinator or Analyst to send you a message with unlocked section(s) of the application.
- ▶ **NOTE** - You will not be able to write a message back to the Coordinator or Analyst, but you will be able to revise the unlocked application section(s) and upload required documents.
- ▶ Both **Request Information** and **Complete Application** tasks should be completed in tandem when possible since the Coordinator or Analyst cannot proceed when a task is with you.
- ▶ When the task **Complete Application** is with you, the application is locked for the Coordinator or Analyst.

REQUEST INFORMATION TASK

- Under **Tasks**, you will receive a task **Request Information** similar to this one below:

The screenshot shows the Appian interface with the 'Tasks (1,238)' tab selected. On the left, there is a 'Dialogue' sidebar with options like 'Assigned to Me', 'Sent by Me', 'Starred', 'STATUS', 'Open', 'DEADLINE', and 'Overdue'. The main area displays a list of tasks. A task titled 'Request Information | Demander de l'information - 375930 - STCF Projet Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.' is highlighted with a red box. A yellow arrow points to this task. Below it, another task 'Complete Application | Compléter la demande' is visible.

- You must first **ACCEPT** the task.

The screenshot shows the 'Request Information' task details page. At the top, there is a message: 'You must accept this task before completing it'. To the right of this message is a blue button labeled 'ACCEPT' with a checkmark icon, and a 'GO BACK' link. A yellow arrow points to the 'ACCEPT' button. Below the message, the task details are displayed under the 'Summary' section. The details include: Application (375930 - STCF Projet Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.), Program (Short-Term Compensation Fund 2022-2023), Application Year (2022-2023), Submission Date (Feb 11, 2022), Applicant (132415 - TEST COMPANY INC.), and Requested Amount (CAD).

- On this window, you will notice under **Requested Information**, the **Subject** and **Message** from the Coordinator or Analyst. Underneath, you will have a list of questions and blank boxes for your responses. You will need to answer all questions before clicking **SEND RESPONSE**:

The screenshot shows the 'Request Information' task details page, specifically the 'Requested Information' section. A red box highlights the 'Subject' and 'Message' fields. The 'Subject' is 'Incomplete Application' and the 'Message' is 'Hi Client. We have received your pre-eligibility application for the Short-Term Compensation Fund for STCF Projet Title Test 2022-2023. To complete your application, the following information must be submitted to Telefilm's satisfaction as soon as possible (and no less than five business days prior to principal photography) for Telefilm to be able to issue the pre-eligibility agreement prior to the start date of the project.' Below this, there is a table with two columns: 'Number' and 'Question'. The first question is 'Please confirm that the budget submitted in the amount of \$10,000,000 \$ is the final locked budget.' and the second is 'Please confirm that the project title "STCF Projet Title Test 2022-2023" is correct.' To the right of the questions is a 'Response' column with text input areas. A yellow arrow points to the 'SEND RESPONSE' button at the bottom right of the page.

Number	Question	Response
1	Please confirm that the budget submitted in the amount of \$10,000,000 \$ is the final locked budget.	Yes, the budget submitted in the amount of \$10,000,000 \$ is the final locked budget.
2	Please confirm that the project title "STCF Projet Title Test 2022-2023" is correct.	No, the correct title should be "STCF Project Title Test 2022-2023".

COMPLETE APPLICATION TASK

- If an application revision or additional documents are required, the Coordinator or Analyst may send you the Task **Complete Application**:

The screenshot shows the Appian interface with the 'Tasks (1,238)' tab selected. On the left, there's a 'Dialogue' sidebar with filters like 'Assigned to Me', 'Sent by Me', 'Starred', 'STATUS' (Open), 'DEADLINE' (Overdue, Today, Within 7 days). The main area displays a list of tasks. A red box highlights the first task: 'Client 132415 Complete Application | Compléter la demande - 375930 - STCF Projet Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.' with a status of '1 minute ago'. A yellow arrow points to this task from the right.

- Through this Task, the Coordinator or Analyst will have sent you a Request to revise certain section(s) of the Application. You must first **ACCEPT** the task.

The screenshot shows the 'Complete Application' task details page. At the top, there's a message: 'You must accept this task before completing it'. A red box highlights the 'ACCEPT' button, and a yellow arrow points to it from the right. Below this, the 'Summary' section shows 'Application 375930 - STCF Projet Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.' and 'Application Year 2022-2023'. The 'Request' section contains a message from the client and two numbered requests. The 'Applicant' section shows 'TEST COMPANY INC.'.

- If the Coordinator or Analyst requires an application update, the **Project** section will be unlocked and you will be able to edit the appropriate field:

The screenshot shows the 'Project' section of the application form. A red box highlights the 'Title' field, which contains 'STCF Project Title Test 2022-2023'. A yellow arrow points to this field from the left. The form includes various sections: 'Has this Project received production funding from Telefilm Canada or the Canada Media Fund?' (Yes/No), 'If you answered "yes" to the previous question, please provide any previous title, application number and/or other comment.' (text area), 'Production Type' (Feature Film), 'Language', 'Please confirm that the "Applicant" is the company producing the project (usually single purpose company not parent company)' (Yes/No), 'Please select the statement(s) that correspond(s) to the Applicant and/or its Related Parties' (checkboxes for various ownership types), and 'Total Canadian Budget (CAD)' (10000000.00).

- ▶ If the Coordinator or Analyst requires revised document(s), the section **Required Documents** will be unlocked, and you will be able to upload them.
- ▶ Click **+Add** to begin uploading a document:

The screenshot shows the 'Required Documents' section in the Appian interface. The interface includes a navigation bar with 'News', 'Tasks (1,238)', 'Records', 'Reports', and 'Actions'. The 'Required Documents' section is highlighted with a red arrow at the top. Below this, a table lists documents. The second row is highlighted with a red box, showing a document named 'TEST_Pre-Eligibility Attestation... PDF - 212.96 KB' with a description of 'Pre-eligibility Attestation V2' and a type of 'Eligibility Form'. A yellow arrow points to the 'Add' button (labeled 1). Another yellow arrow points to the checkbox for the statement (labeled 3). A third yellow arrow points to the 'SUBMIT' button (labeled 4). The 'Required Documents' section is highlighted with a red arrow at the top.

- ▶ In order to upload and name all required documents correctly, please refer to the list of **required documents** listed in the [Guidelines](#) (Section 4) and on the [Attestation Form](#) (p.3).
- ▶ Upload each required document separately.
- ▶ You cannot delete previously submitted documents.
- ▶ Please identify outdated documents as superseded in the Description column. For example: **Pre-Eligibility Attestation – Superseded**.
- ▶ Then click **SUBMIT**

The screenshot shows the 'Required Documents' section in the Appian interface. A confirmation dialog box is displayed, asking the user to confirm that all required documentation has been uploaded. The dialog box contains the text: 'Before submitting your application, please make sure all the required documentation has been uploaded according to the Required Documents Checklist. We encourage you to read the list carefully. If you have any questions prior to submission, please contact our coordination team at 1-800-567-0890. Do you wish to continue?'. There are 'NO' and 'YES' buttons. A yellow arrow points to the 'YES' button. The background shows the 'Required Documents' section with a table of documents.

- ▶ Once the page has been successfully submitted, the screen will disappear, and you will end up back at your list of tasks. (If that does not happen, **scroll up and carefully scan for red borders or text** that indicate that additional information is required.)
- ▶ Once you click **SUBMIT**, the Coordinator or Analyst will receive a notification letting them know you have revised the application and submitted the required documents.

TELEFILM CONTRACT SIGNATURE

- ▶ Should you require to create a single purpose company, it is highly recommended to do so before contracting. **NOTE** - the process of implementing the change to a single-purpose company post-contract is lengthy.
- ▶ The Telefilm Contract should never be modified by the Client.
- ▶ The electronic signature option will be implemented gradually. In the meantime, please print, sign, scan, upload and submit the Telefilm Contract.
- ▶ **IMPORTANT** - Since there are no more Tasks generated once the Telefilm Contract is fully executed, it is up to you to initiate the submission of the conditions. Follow the section **How to Fulfill Conditions**.

CONTRACT SIGNATURE

- ▶ Once the Telefilm Contract is ready for your signature, you will receive the task **Contract Signature**:

The screenshot shows the Appian interface with the 'Tasks (1,238)' tab selected. On the left, there is a 'Dialogue' sidebar with filters for 'Assigned to Me', 'Sent by Me', 'Starred', 'STATUS', 'Open', 'DEADLINE', and 'Overdue'. The main task list displays three tasks, with the top one, 'Contract Signature | Signature du contrat - 375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 Films Caramel Inc. TEST COMPANY INC.', highlighted by a red box. A yellow arrow points from the right towards this task. The task is marked as 'NEWEST' and was received '6 minutes ago'.

- ▶ Open the task and click **ACCEPT**:

The screenshot shows the details of the 'Contract Signature' task. At the top, a message states 'You must accept this task before completing it'. In the top right corner, there are two buttons: 'ACCEPT' (highlighted with a red box and a yellow arrow) and 'GO BACK'. Below this is a 'Summary' section with the following details:

Application	375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.	Program	Short-Term Compensation Fund 2022-2023
Applicant	132415 - TEST COMPANY INC.	Application Year	2022-2023
		Submission Date	Feb 11, 2022
		Requested Amount (CAD)	

- ▶ Then, click on the **Contract** link to open the Telefilm Contract. Once you have read the Telefilm Contract, sign it, and upload the fully executed copy. The contract has to be signed by the contract signatory listed in the application.
- ▶ If the Telefilm Contract has been modified or signed by someone other than the contract signatory, it will be rejected by the Coordinator or Analyst.
- ▶ Once uploaded, click **SUBMIT**:

Contract Signature

Summary

Application 375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.

Program Short-Term Compensation Fund 2022-2023

Applicant 132415 - TEST COMPANY INC.

Application Year 2022-2023

Submission Date Feb 11, 2022

Requested Amount (CAD)

Applicant Region Montreal

Correspondence Language English

Default Dialogue

Contract Signed by Telefilm

[signed_contract.pdf](#) 1
Click on the link to download and sign the contract

Your Signature 2

Upload Document

TEST_Signed_contract
PDF - 719.37 KB
Upload the contract with your signature here

☒ I certify that the document I have signed is the document I downloaded from this screen 3

[REJECT](#) [SUBMIT](#) 4

- ▶ Once the Telefilm Contract has been approved, you will find it in the **Summary - Letters and Agreements** section of the project file:

Records My Telefilm Applications | Mes Demandes Téléfilm

375945 - STCF Project 2022-2023 TEST Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.

[DIRECT DEPOSIT](#) [FULFILL CONDITIONS](#)

Summary Milestones Notes News Related Actions

Summary

Application 375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.

Program Short-Term Compensation Fund 2022-2023

Application Year 2022-2023

Submission Date Feb 17, 2022

Letters and Agreements

Name	Type	Date
TEST_Pre-eligibility Agreement 2022-2023.pdf	Contract	Feb 17, 2022

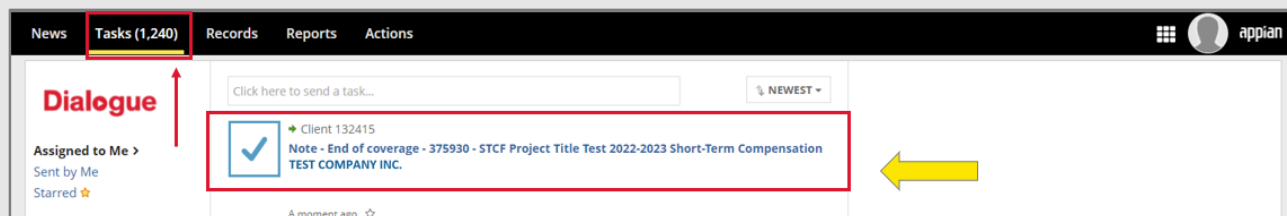
- ▶ When you look at the **Summary** view of your application, you will see that project details have been updated.

PROJECT CHANGES POST-CONTRACTING

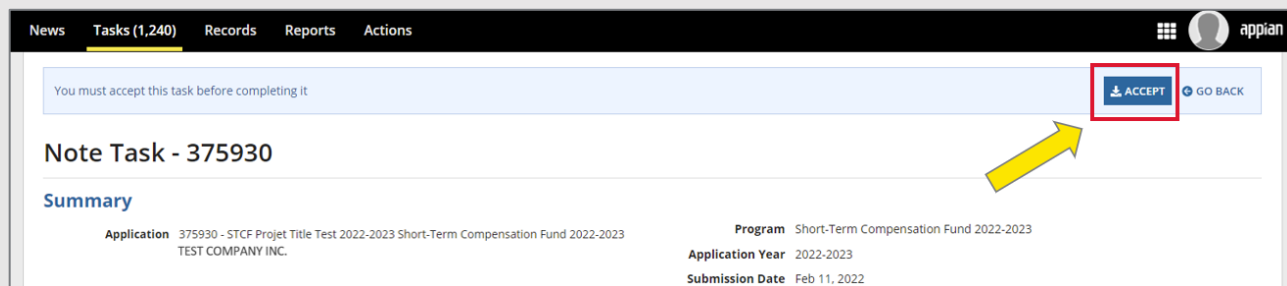
- ▶ Once the Telefilm Contract is signed, the application is locked.
- ▶ Please contact your Coordinator or Analyst via email to alert them of changes. Provide them with a summary of significant changes and they will inform you of what is needed in order to proceed. The summary could include the following:
 - If you would like to inform Telefilm that principal photography or animation dates have changed after the contract has been fully executed and request an amendment to the end of coverage
 - if a single-purpose company is created for the project post-contracting
- ▶ If you would like to contact us and are unsure of your Coordinator or Analyst's name and email address, please -email covid-19@telefilm.ca for assistance.
- ▶ It is highly recommended that you create a single purpose company before contracting. **NOTE** - the process of implementing the change to a single-purpose company post-contract is lengthy.

NOTE TASK

- ▶ The Coordinator or Analyst may contact you with further questions via **Tasks - Note**:



- ▶ Click **ACCEPT**:



- ▶ Read under **Note** the **Topic**, **Subject** and **Message** from your Coordinator or Analyst. Underneath, you will have a list of question(s) and blank box(es) for your response(s). You will need to answer all questions before clicking **SEND RESPONSE**:

Note Task - 375935

Respond By Feb 18, 2022 15:00:00.

Summary

Application 375930 - STCF Projct Title Test 2022-2023 Short-Term Compensation Fund 2022-2023
TEST COMPANY INC.

Program Short-Term Compensation Fund 2022-2023

Application Year 2022-2023

Submission Date Feb 16, 2022

Applicant 132415 - TEST COMPANY INC.

Requested Amount
(CAD)

Correspondence Language English

Note

Topic Other
Subject Telefilm file # 375935 FULFILL CONDITIONS REQUEST
Message Dear client.

Per the STCF Pre-Eligibility Agreement, the end of the STCF coverage is scheduled to end on April 28, 2022. As soon as filming is complete please log into your Dialogue account and select this project by going to My Telefilm Applications and search using the file # or title. Click on the title to open the application and go to Fulfill Conditions. In the Conditions section please confirm that principal photography has been completed without interruption. In the event, that principal photography is not complete please contact the coordinator or analyst in charge of your file via email immediately to request an extension of coverage.

Number	Question	Response
1	Please acknowledge receipt of this request.	I confirm receipt and will fulfill conditions tomorrow once production has wrapped

2 [SEND RESPONSE](#)

- If the **Note Task** is related to a **Fulfill Conditions Request**, please see section [Fulfill Conditions](#).

APPLICATION CHANGES

- Depending on the nature of the proposed changes, your Coordinator or Analyst may choose to return the application form to you so that you may update your application details and/or provide additional documentation. If that is the case, you will receive a task **Application Changes – Edit Application**:

News **Tasks (1,240)** Records Reports Actions

Dialogue

Assigned to Me >
Sent by Me
Starred ☆

Click here to send a task...

NEWEST

Client 132415
Application Changes - Edit Application | Révision de la demande - Modifier la demande -
375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023
TEST COMPANY INC.

- Click **ACCEPT** and follow the instructions from the Coordinator or Analyst's **Request**:

News **Tasks (1,240)** Records Reports Actions

Application Changes - Edit Application

Summary

Application 375930 - STCF Projct Title Test 2022-2023 Short-Term Compensation Fund 2022-2023
TEST COMPANY INC.

Application Year 2022-2023

Program Short-Term Compensation Fund 2022-2023

Request

Dear Client,

I have unlocked the Contacts section. Could you please revise the editable sections to change the contact name for all correspondence since it has changed.

Thank you.

- ▶ If the Coordinator or Analyst requested more documents, scroll down to the **Required Documents** section and click **+Add** to begin uploading:

- ▶ In order to upload and name all required documents correctly, please refer to the list of **required documents** listed in the [Guidelines](#) (Section 4) and on the [Attestation Form](#) (p.3).
- ▶ Upload each required document separately.
- ▶ You cannot delete previously submitted documents.
- ▶ Please identify outdated documents as superseded in the Description column. For example: **Pre-Eligibility Attestation – Superseded**.
- ▶ **IMPORTANT** - Before submitting your application, make sure to print a copy (or print to PDF). Once submitted, the application form will no longer be available as it will be under evaluation.
- ▶ Check the Statement box before hitting **SUBMIT**:

- ▶ Then select **YES**:

- ▶ Once the page has been successfully submitted, the screen will disappear, and you will end up back at your list of tasks. (If that does not happen, **scroll up and carefully scan for red borders or text** that indicate that additional information is required.)
- ▶ Until changes have been approved, the project details that will appear in your file will be the details given in your original Telefilm Contract.

HOW DO I KNOW IF THE CHANGES HAVE BEEN APPROVED?

- Should you wish to see whether changes have been approved or not, go under **Records**, choose **My Telefilm Applications** and search for the project using the project name or number:

The screenshot shows the Appian interface with the 'Records' tab selected. A search bar is at the top. Below it, there are several tiles for different record types. The tile for 'My Telefilm Applications | Mes Demandes Téléfilm' is highlighted with a red box, and a yellow arrow points to it.

- Click on **Notes** to see that the changes to the application have been approved:

The screenshot shows the Appian interface with the 'Notes' tab selected. A red box highlights the 'Notes' tab, and a yellow arrow points to it. Below the tab, there is a table of client tasks.

Subject	Topic	Subtopic	Message	Due Date	Requested Date	Response Date	Responder	Status	
End of coverage	Other	Other	Dear Client, Please see question below and please respond as soon as possible. Please note that Telefilm will close the file two days after the contracted end of coverage date if we have not received a response. Thank you.		Feb 16, 2022 17:21:52	Feb 17, 2022 15:51:15	Mr Partner III	✓	Documents/Client Responses

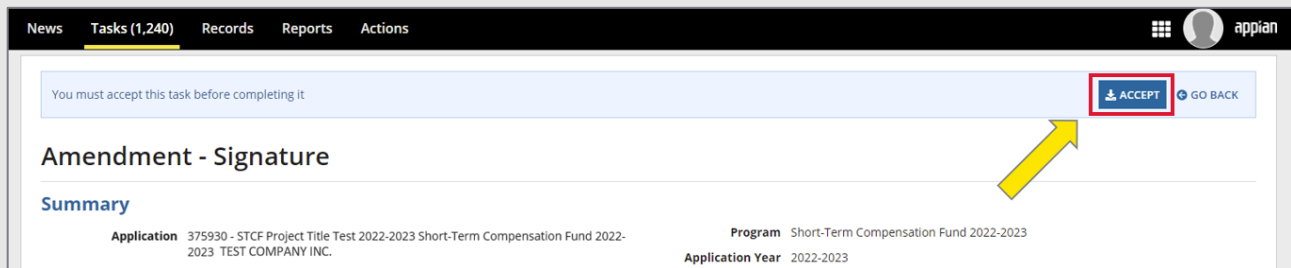
- When you look at the **Summary** view of your application, you will see that project details have been updated.

AMENDMENT

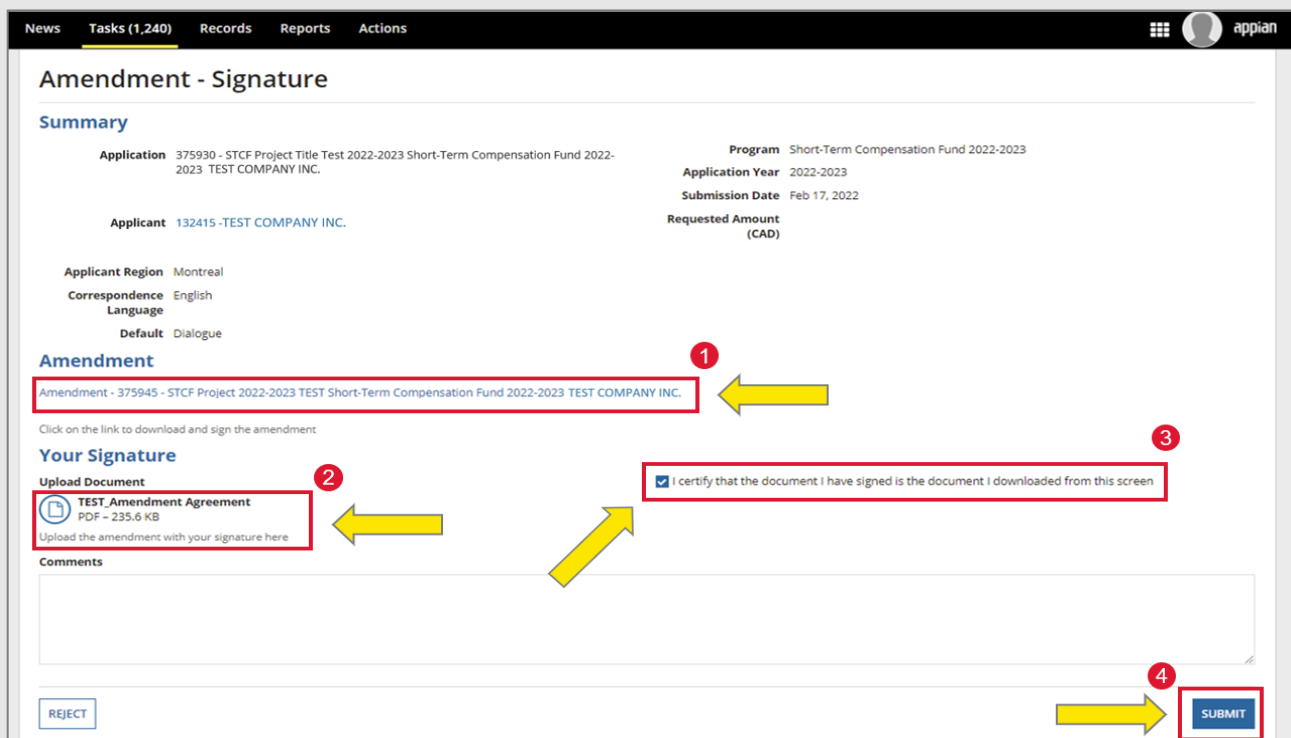
- ▶ Depending on the modification of your principal photography dates or for other reasons, it may be necessary for your Coordinator or Analyst to issue a Telefilm Amendment Agreement. If so, under **Tasks**, you will receive the task **Amendment – Signature Amendment**:



- ▶ Open the task and click **ACCEPT**:



- ▶ Click on the **Amendment** link to open the Telefilm Amendment. Once you have read the Telefilm Amendment, sign it, and upload the fully executed copy.
- ▶ The contract has to be signed by the contract signatory listed in the application. If the Telefilm Contract has been modified or signed by someone other than the contract signatory, it will be rejected by the Coordinator or Analyst.
- ▶ Once uploaded, click **SUBMIT**



- Once the Telefilm Amendment has been approved, you will find it in the **Summary - Letters and Agreements** section of the project file:

Records / My Telefilm Applications | Mes Demandes Téléfilm

375945 - STCF Project 2022-2023 TEST Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.

Summary | Milestones | Notes | News | Related Actions

Summary

Application 375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.

Applicant 132415 -TEST COMPANY INC.

Applicant Region Montreal

Correspondence Language English

Default Dialogue

Program Short-Term Compensation Fund 2022-2023

Application Year 2022-2023

Submission Date Feb 17, 2022

Requested Amount (CAD)

Letters and Agreements

Name	Type	Date
TEST_Pre-eligibility Agreement 2022-2023.pdf	Contract	Feb 17, 2022
TEST_Amendment Agreement.pdf	Amendment	Feb 18, 2022

- When you look at the **Summary** view of your application, you will see that project details have been updated.

HOW TO FULFILL CONDITIONS

- Submission of deliverables can only be done once the Telefilm Contract or Amendment has been signed.
- A few days before your STCF coverage expires you will receive a notification that there is a notification in Dialogue asking you to fulfill conditions.

FULLFILL CONDITIONS

- Once you have submitted the fully executed Telefilm Contract you will receive a notification reminder to close your condition 2-3 days prior to the end of principal photography. When you have completed principal photography, go under **Records** and choose **My Telefilm Applications**:

The screenshot shows the Appian interface with the 'Records' tab selected. A search bar is at the top. Below it, there are several record type tiles. The tile for 'My Telefilm Applications | Mes Demandes Téléfilm' is highlighted with a red box. A yellow arrow points to this tile from the text above.

- Search for the project using the project name or number:

The screenshot shows the 'My Telefilm Applications' search results page. A search bar is at the top. Below it, there is a table of results. The first row is highlighted with a red box. A yellow arrow points to this row from the text above.

Application Number - Title	Program	Status	Language	Fiscal Year
375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.	Short-Term Compensation Fund 2022-2023	Signed		2022-2023

- Select **FULLFILL CONDITIONS**:

The screenshot shows the record page for '375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.'. A red box highlights the 'FULFILL CONDITIONS' button. A yellow arrow points to this button from the text above.

Summary

Application 375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.

Applicant 132415 - TEST COMPANY INC.

Program Short-Term Compensation Fund 2022-2023

Application Year 2022-2023

Submission Date Feb 11, 2022

Requested Amount (CAD)

- Scroll down to **Conditions**. To the right of the deliverable “Confirmation of the end of the coverage period”, choose **Actions – Submit or Comment**

Fulfill Conditions

Summary

Application 375930 - STCF Project Title Test 2022-2023 Short-Term Compensation Fund 2022-2023 TEST COMPANY INC.

Program Short-Term Compensation Fund 2022-2023

Application Year 2022-2023

Submission Date Feb 17, 2022

Requested Amount
(CAD)

Applicant 132415 - TEST COMPANY INC.

Applicant Region Montreal

Correspondence Language

Default Dialogue

[View Application](#)

Milestones

	Description	Due Date	Amount (CAD)
►	Milestone	Apr 28, 2022	0.00

Conditions

[Refresh](#)

Description	Document Type	Comments (Internal)	Directives (External)	Status	Actions
Confirmation of the end of the coverage period	TFC/CMF financing contract			Not Received	Comment Submit or comment

[CLOSE TASK](#)

[SUBMIT TO TELEFILM](#)

- Select **+ADD** and when the box appears type in the description box “I confirm principal photography has been completed without interruption” and select **SUBMIT**:

Conditions

• Clicking on Refresh will delete any information entered which has not been submitted yet with the SUBMIT button in the Conditions section.

[Refresh](#)

Description	Document Type	Directives	Status	Actions
► Confirmation of the end of the coverage period	TFC/CMF financing contract		Not Received	

Click +Add to continue. Please upload and describe the document(s)/URL(s) or explain why this condition is not applicable to the project. The maximum file size allowed is 25MB. Documents too large are highlighted in red.

Document	Website URL	Description	Refused
<input type="button" value="UPLOAD"/> Drop file here		<div> <div>I confirm principal photography has been completed without interruption</div> </div>	<input type="checkbox"/> <input type="button" value="X"/>
<input type="button" value="+ Add"/> <input type="button" value="CANCEL"/>			<input type="button" value="SUBMIT"/>

- ▶ After selecting **SUBMIT**, you will be asked to confirm you have added all documents or comments. Select **YES**.

Default Dialogue

View Application

Milestones

Description	Due Date	Amount (CAD)
Milestone	Apr 28, 2022	0.00

Conditions

• Clicking on Refresh will delete any information entered which has not been submitted yet with the SUBMIT button in the Conditions section.

Refresh

Have you added all documents or comments required to fulfill this condition?

NO YES

- ▶ Review and select **SUBMIT TO TELEFILM**

Milestones

Description	Due Date	Amount (CAD)
Milestone	Apr 28, 2022	0.00

Conditions

• Clicking on Refresh will delete any information entered which has not been submitted yet with the SUBMIT button in the Conditions section.

• Please don't forget to select Submit to Telefilm (bottom right) once all conditions are uploaded to Dialogue. If you do not select Submit to Telefilm, your Milestone Conditions will not be sent to Telefilm Canada.

Refresh

Description	Document Type	Directives	Status	Actions
Confirmation of the end of the coverage period	TFC/CMF financing contract		Received	

CLOSE TASK SUBMIT TO TELEFILM

- ▶ Once done, remember to click on your **TASKS** and **SEND RESPONSE** acknowledging the conditions have been fulfilled.
- ▶ For more details on **Note Tasks**, please see section [Project Changes Post-Contracting – Note Task](#)

News Tasks (1,240) **Records** Reports Actions

filled the condition as requested. The application will then be completed. Sincerely, Main Analyst/Coordinator

Document	Website URL	Type
No items available		

Number	Question	Response
1	Please confirm when the FULFILL CONDITIONS has been completed. Note, Telefilm will change the status to completed if the FULFILL CONDITIONS request has not been completed 2 days after principal photography was scheduled to end (as noted in the Pre-Eligibility Agreement).	done!