Cancer Institute NSW Grants Management System

Grant Applicant User Guide

Version 1.3 | 21 March 2022

NSW GOVERNMENT

Cancer Institute NSW

Contents

1. Introduction

The Grants Management System (GMS) is the online portal that the Cancer Institute NSW (the Institute) uses for grant applications. The GMS allows the grant applicant to draft, edit and submit their application before the closure date. The user may also have additional access to comment or share the application and projects with other users of GMS.

The recommended browser to use is Google Chrome (version 64 and higher).

1.1 Target audience

The information in this user manual is aimed at researchers who would like to apply for open Cancer Institute NSW grants.

1.2 Guidelines

It is important that you refer to the applicable grant round guidelines in conjunction with this manual to understand how each function relates to the Cancer Institute NSW grants lifecycle.

1.3 ORCID

Consistent with the position of the National Health and Medical Research Council (NHMRC) and the Australian Research Council (ARC), the Institute requires all researchers applying for funding to have an Open Researcher and Contributor ID (ORCID) identifier and to keep the information up to date.
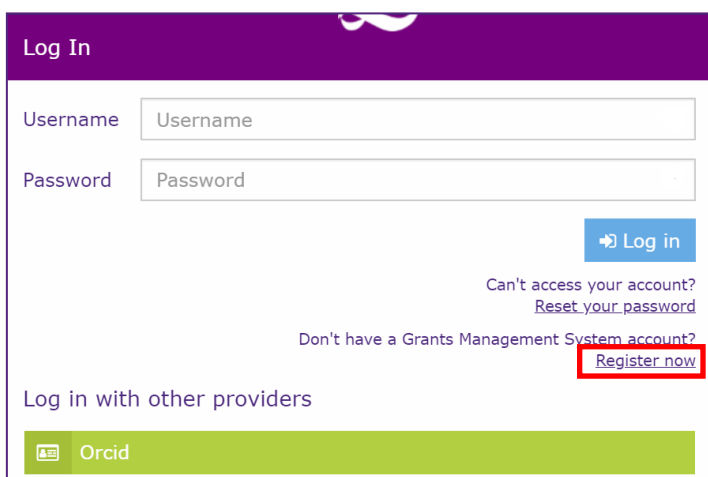
The GMS is able to link relevant details you have entered in ORCID to your application. Instructions on how to enter your ORCID into GMS is outlined in this manual.

Details about ORCID can be found here: https://orcid.org/.
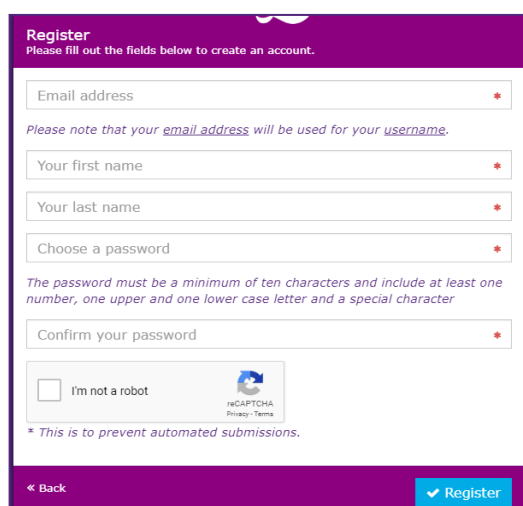
2. Registration

To apply for a grant you will first need to register to the Cancer Institute NSW's Grants Management System (GMS). To access the GMS go to: https://grants.cancerinstitute.org.au.

1. Click on "Register now" if you have not already registered.
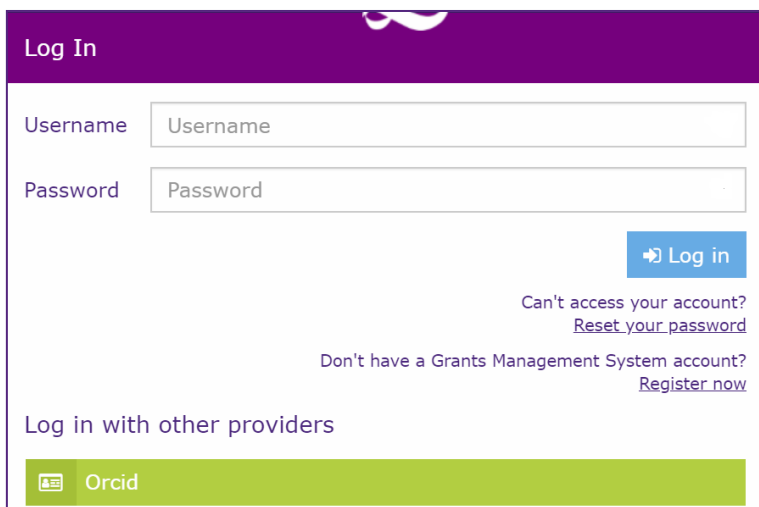
2. The **Register form** will be displayed.

3. Complete the form. The password must be 10 characters and include at least one number, one upper/lower case letter and a special character.

4. For security purposes, click **I'm not a robot** - reCAPTCHA may require you to perform an additional task by selecting tiles of various objects.

5. Select **Register**.

6. A registration email will be delivered to the email address you specified in the form.

7. If you do not receive the email within a few minutes, check your junk e-mail folder. For any further support, check with your organisation's IT support or contact the Cancer Institute NSW Grants Team on CINSW-Grants@health.nsw.gov.au.

8. Click the link in the confirmation email to activate your account.

3. Login to the GMS

Once you have registered and your account is activated, you can login to the GMS.

1. Enter your **username** and **password.**

    Note: Your username is your email address that you have registered for your account.

2. Select **Log in.**

3. You may prefer to link your GMS account with your ORCID for easy access to GMS. If you click on the "Orcid" button, the site will direct you to the ORCID website where you will be asked to authorise the GMS as a trusted site. GMS will then request you to register your linked ORCID. Next time you login, you can simply click on the Orcid button instead of entering your username and password.
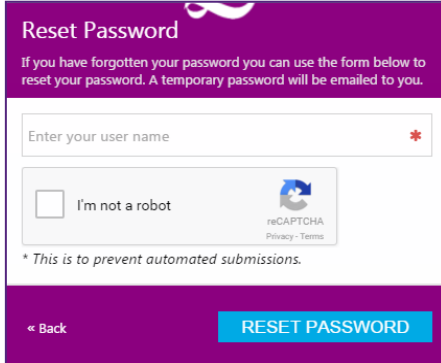
4. Select **Agree** to accept the Licence Agreement.

5. The GMS homepage will be displayed.

4. Forgotten password

If you have forgotten your password, follow the steps below to reset your password.
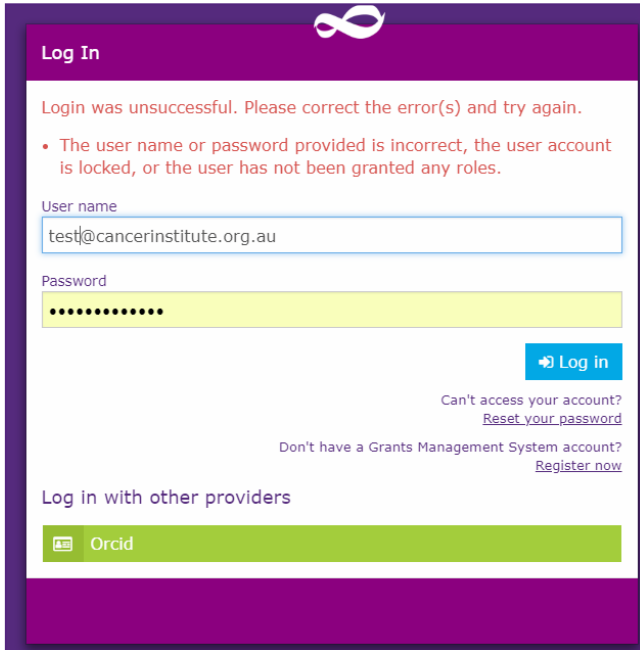
1. Click the **Reset Password** link.

2. Enter your email address in the text box.
3. Click **I'm not a robot** and complete the reCAPTCHA questions if required.
4. Select **Reset Password.**
5. Click **Finish.**
6. A password reset link will be emailed to the email address associated with your user account. Click on the link to finalise the password reset.

5. Incorrect password or locked account

If you have entered your password incorrectly more than 3 times, the account will be locked. The following message may appear.
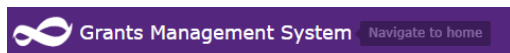

Before contacting the Institute, you should try to reset your password first using the instructions above. If you cannot log into your account after resetting the password, email CINSW-Grants@health.nsw.gov.au to have your account unlocked.

6. GMS homepage

After you login and select "Agree" to the License agreement, you will be presented with the GMS homepage, which is the dashboard of the system.

1. The menu bar allows access to any existing Applications, Projects and your user Profile.

2. The "New application" button allows you to start a new application.

3. The "Grant rounds" section displays the grant rounds that are currently open.

4. The timer at the top of the page shows the time left before your session will expire after inactivity.

5. To return to the home page click on **Grants Management System** on the left hand side of the tool bar.

7. Updating your user profile

Once you have registered, a basic profile will be created in the GMS. In this profile you can update your details (e.g. address, email, appointments and qualifications). You can also update your password and username in your account settings. Information stored in your profile can be used to pre-populate the application form with information e.g. appointments, so you do not need to re-type this information in the application form.

You are also able to synchronise your ORCID qualification and appointment information with GMS. To update or view your profile:

1. Select **Profile** from the toolbar.

2. The **Profile** page will appear.
3. Enter your Residential status.
4. Enter your ORCID. If you have registered your ORCID previously, it should appear here.

5. Using the menu on the left hand side, you can navigate through the different options and update your details.

The main sections that will require your input are listed under Personal Details below.

7.1 Personal Details

1. Select "Reset" to discard any additional changes you make.
2. Select "Notification" to receive email updates.
3. Select "Researcher" if relevant.
4. If you have an ORCID, you can synchronise your publication and qualification data that has already been entered in ORCID into GMS by clicking on "Synchronise with

ORCID". This will allow the GMS to easily link to this data to your applications. The links will only appear after you enter an ORCID into the below field:

7.2 Email Details

Emails will be sent to your preferred email address (i.e. the email address you used to register). You can change your preferred email address as follows:

1. Select **Email details**
2. **Add new email address.**
3. Enter the email address.
4. Select the preferred checkbox (only one email address can be specified as preferred).
5. Select **Save**.
6. You cannot delete the email address used to login to your account. To change your login email address select **Account Settings > Change username**.
7. The preferred status is displayed in the email list.

7.3 Account Settings

From here you can change your username or password.

Please note that the username must be a valid email address.

8. Creating an application

You can begin an application from the GMS home page by clicking on the
"New application" button.

➕ New application

1. Alternatively, you can go to the application page by clicking on the **applications tab** on the toolbar.

2. Click **New application.**

3. From the drop down list select the grant program you are applying for.

4. Create a title for the application and add any comments or notes. The application title will appear on your dashboard for your own reference when the application is in progress. The final title of the application will be the one that is entered in the application form.

> **✏ Name application**
>
> The application title may be changed before the application is submitted.
>
> The application notes may be used for your own reference and will not be included as part of the final submission.
>
> **Application title**
>
> [   ]
>
> **Application comments**
>
> [   ]
>
> **✔ Done**   **✖ Cancel**

5. Use the left hand menu or forward and back arrows to navigate through the application form.

> **Translational Program Grant (TPG)**
> Research Plan
> Investigators
> Budget
> Categories
> Attachments
> Certification

Forward and back arrows: ⬅ ➡

A green tick indicates that the page has passed the necessary validation. A cross next to the page means that it has not passed all the validation e.g. all mandatory fields have not been filled in.

6. Select **Save** to save your changes. A dialogue box will appear letting you know your application has been saved. Click Close to complete the saving process. You can save and continue as often as you like.

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7. You can also download a PDF copy of the application at any time using the **preview button**. Please allow a few seconds for the system to generate the PDF preview copy to your browser.

8. Once you have started an application it will be assigned a unique **application identifier.** Applications which are in progress will be listed on the GMS homepage and on the applications page.

Notes:

- Help tips are provided throughout the form. Click on the question mark icon to display a description.

- Mandatory fields are indicated with an *.

- Incomplete sections of the application will appear with a cross symbol next to the section name.

- Certain sections of the application form will require you to provide multiple entries (e.g. milestones, publications).

- Entries can be added, deleted or duplicated using add, delete or fill down buttons. To delete a row, you must select the check box next to the row first before you click on the ⊖ symbol.

9. Submitting an application

To submit the application:

1. From the certification page read and confirm that the required actions have been undertaken.

2. Click on **Submit.** Please be aware that once an application has been submitted it cannot be changed.

3. You will receive an email confirming that the application has been successfully submitted.

4. A PDF version of the submitted application and other documents can be accessed by clicking on the **Download application attachments** icon.

10. Sharing an Application

If your Administering Institution requires you to share your application for their review, follow the steps below:

1. Navigate to Applications page.
2. Select 3 dots next to the relevant Application ID.

3. Select **Invite User to register or share application**.
4. Select the **+ Add another User** icon.

5. Add Administering Institution contact (AIC) email. *Please note that all AIC emails are registered as users and will be found*.

6. Access is selected based on what the AIC would like to do.
    a. If AIC is only reviewing application, **view access** is sufficient

     b. If AIC is reviewing and editing application, or adding the endorsement letter, **edit access** is required.

Please note: *An application can be shared while it is in progress and after it has been submitted.*

11. Post Approval

Once an application is approved, the Grants team converts it to a project where it is managed until its completion. Navigate to the **Projects** tab at the top of the GMS home page to view all approved projects.

Reporting and financial milestones are managed through the Project. Selecting the **Project identifier** will allow the user to view Project details such as:

- Project start and end date;
- Milestones that are due;
- Funds invoiced and remaining;

- Who the Project is shared with

12. Submitting a progress report

From January 2021, all annual progress reports and final reports must be submitted by the Administering Institution (AI) of the grant holder. All grantees must complete the required information prior to the AI certificating and submitting the report.

Please note that Fellowship annual progress reports must be submitted via the GMS. Fellowship final reports, and all Translational Program Grant reports must be submitted to CINSW-Grants@health.nsw.gov.au using the templates on the [Grants website](#).

12.1 Submitting a Fellowship Annual Progress Report

Please ensure that your project is Shared with Edit Access with your Supervisor (see Step 11)

1. Log into the GMS portal.
2. From the home page, select to the relevant project.
3. Navigate to the **Milestones** page using the menu to the left of the screen.
4. Select the progress report that is due.
5. Complete the required fields.
6. Have your Supervisor complete the Supervisor section.
7. Let your AI contact know that your report is ready for Certification.
8. AI will review the report and attach the Certification letter.
9. AI will submit the report via the GMS.

12.2 Submitting a Fellowship Final Report

Please use the Fellowship Final Report template on the [Grants website](#).
1. Fellow to complete Sections A-F and to sign H.1.
2. Supervisor to complete Section G and sign H.2.
3. AI to review the report and sign section H.3.
4. AI to submit report via email to [CINSW-Grants@health.nsw.gov.au.](mailto:CINSW-Grants@health.nsw.gov.au)

Please note that sections H1, H.2 and H.3 must be signed. Electronic signatures are acceptable.

12.3 Submitting a Translational Program Grant Annual Progress and Final Reports

Please use the Translational Progress Report or Final Report template on the [Grants website](#).

1. Chief Investigator to complete Sections A-F and to sign G.1.
2. AI to review the report and sign section G.2.

Please note that sections G.1 and G.2 must be signed. Electronic signatures are acceptable.

13. Administering Institution Contacts Project Permissions

For the purpose of reporting requirements, the nominated Administering Institution Contact and Financial Officer will have the ability to view the approved project and action project milestones via the GMS. Please refer to the [Cancer Institute website](#) for a list of the nominated Administering Institution contacts.

14. Help and information

To access help tips across the GMS, click on the help icon on the tool bar. If you do experience any problems or would like some further information, please contact the Cancer Institute NSW grants team on [CINSW-Grants@health.nsw.gov.au.](mailto:CINSW-Grants@health.nsw.gov.au)

You may also access the grant guidelines by using the "**Information**" link from the top menu bar.