

Academy of Medical Sciences Grant Management System User Guide

Welcome to the Academy of Medical Sciences online grant system

The Academy of Medical Sciences is the independent body in the UK representing the diversity of medical science. Founded in 1998, our mission is to promote medical science and its translation into benefits for society. Our vision is to improve health through research.

Table of Contents

About this document	<u>3</u>
About Flexi-Grant	<u>3</u>
Registration and Login	<u>4</u>
For new users	<u>4</u>
Forgotten passwords and locked accounts	<u>5</u>
Managing your account details	<u>5-6</u>
Guidance notes for applicants	<u>7</u>
Starting your Application	<u>7</u>
Summary page	<u>8</u>
Example question page	<u>9</u>
Adding signatories	<u>9-10</u>
Submitting an application	<u>11</u>
Status of your application	<u>12</u>
Guidance notes for award holders	<u>13</u>
Managing and reporting on your grant	<u>13</u>
Guidance notes for signatories	<u>14</u>
Accepting a declaration	<u>14</u>
Signing a declaration	<u>15</u>
Providing multiple declarations	<u>15</u>

About this document

This document describes how to register as a user of the Academy's online grant management system (Flexi-Grant) and how to use the system to apply for a grant, and act as a collaborator or signatory of an application.

If you have any queries that are not answered by these guidance notes, or if you are experiencing technical difficulties, please get in touch with the Academy's grants team at grants@acmedsci.ac.uk.

About Flexi-Grant

Compliance with the Data Protection Act 1998

Please consult our Grants and Programmes data protection policy to find out how we control and process information provided via Flexi-Grant.
www.acmedsci.ac.uk/grants-data-protection-policy

Applications for the Academy's grant schemes will be accepted via Flexi-Grant. The entire application process will be managed through Flexi-Grant including approvals by signatories. Please do not send us a hard copy of an application or an electronic copy using word documents – these will not be accepted.

Please note that all applicants will need the validity of their application to be verified by the appropriate signatories prior to the application deadline. All signatories will approve your application by signing a declaration using Flexi-Grant. You will be able to invite them through Flexi-Grant; however we strongly recommend you contact them yourself before inviting them through the system. You will not be able to submit your application without their approval. The submission deadline will be at 5 pm (London, local-time) on the date of the application deadline.

Registration and Login

You must have a registered account with the Academy's [Flexi-Grant](#) to apply for, and manage, your grants online.

For new users

You will need to create an account to apply. Below is a picture of the [registration and login page](#) for Flexi-Grant. Please click on the 'register' button indicated in Figure 1.

Once you have accepted the Academy's Terms and Conditions and our Data Protection and Privacy Policy you will be asked to provide an email address and password so that you can login to Flexi-Grant. Please provide a current email address and phone number (optional) when creating your profile. We will use these details to communicate with you about your application.

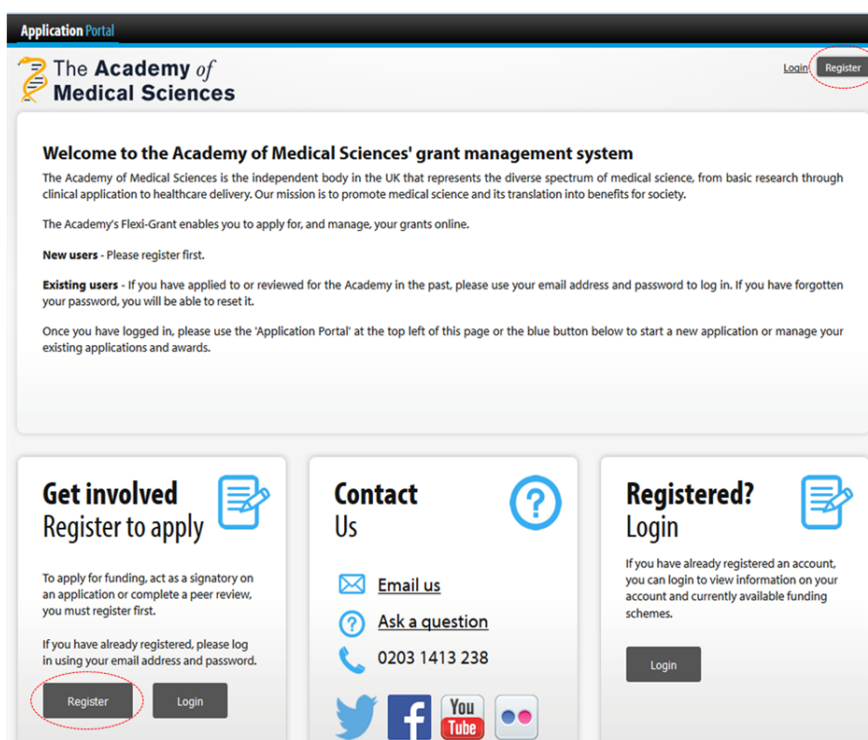


Figure 1. Registration and login screen

To complete your registration, you must confirm your email address. A confirmation email will be sent to you; please click the link provided to activate your user account. If you do not receive the confirmation message within a few minutes of registering,

Forgotten passwords and locked accounts

If you have forgotten your password, a reset password link can be sent to you via email by following the forgotten password option on the login page.

If you enter your password incorrectly 3 or more times, your account will be locked; this is to protect you from any attempts by a third party to access your data. To unlock your account, please contact the Academy via email (grants@acmedsci.ac.uk).

Managing your account details

Flexi-Grant will use the details provided when first registering your account as your contact details. You can update your contact information by clicking the 'My account' button on the Portal homepage (Figure 2). The home page is the starting point for creating and accessing applications, managing your user account details and changing your password.

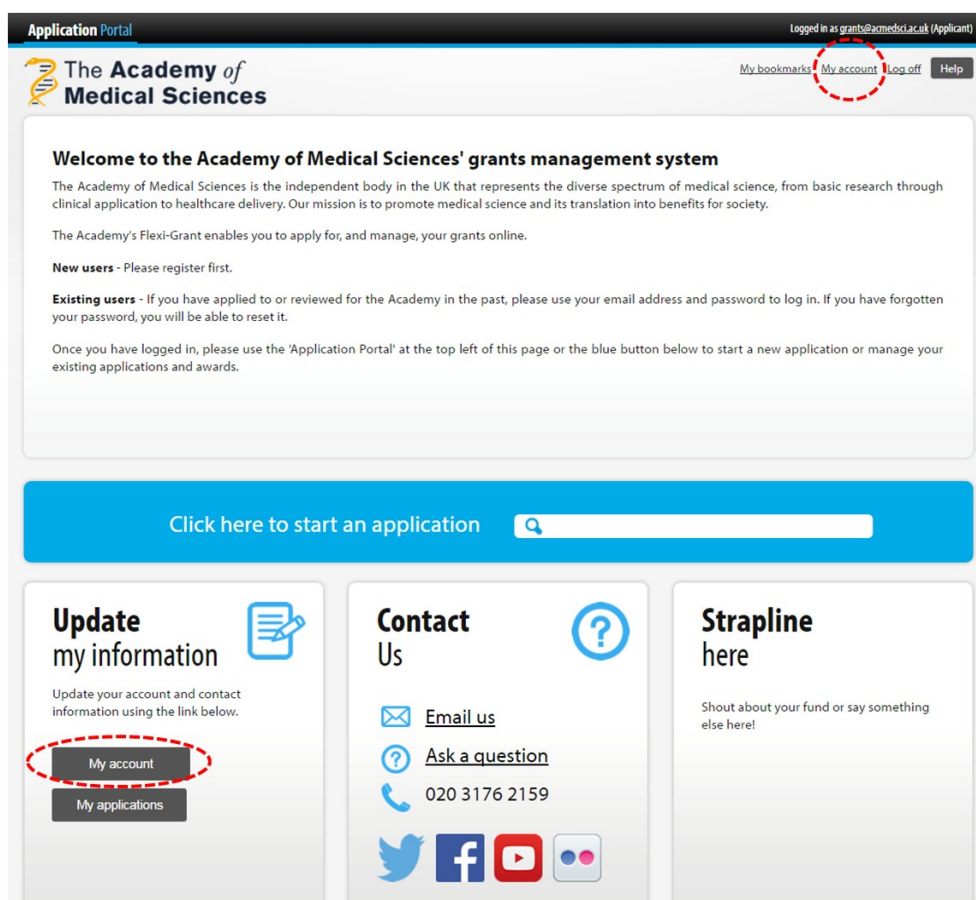


Figure 2. The portal homepage

The 'My account' page, shown in Figure 3, shows your current contact information. You can use the link(s) provided on this page to update your contact and organisation details as well as your account password. Once you have updated your information, use the left-hand navigation bar to return to the Portal [Homepage](#).

Application Portal Logged in as [grants@acmedsci.ac.uk](#) (Applicant)


The Academy of Medical Sciences [My bookmarks](#) [My account](#) [Log off](#) [Help](#)

[Portal homepage](#)
[My information](#)
[My contact details](#)

My account

John Smith

This form shows your current contact information. You can use the link(s) below to update your contact and organisation details. Once you have updated your information use the menu on left to return to the Portal Homepage.

 **Username:** grants@acmedsci.ac.uk
Type of user: Applicant
Organisation:

T: 123 456 789 - (Fax) **S:** (no record)
E: [grants@acmedsci.ac.uk](#)
W: (no record)
Primary address:
41 Portland Place, London, United Kingdom (Great Britain)

[Update my contact details and link my account to an organisation](#)

[My applications](#)

Update my user account details

You can use the link below to update your password.

[Change password](#)

Figure 3. Managing your account details

Guidance notes for applicants

Starting your Application

Once you are ready to begin an application, select from the drop down menu on the main 'click here to start an application' button. Alternatively, select the 'Application Portal' button on the top left hand side of the page.

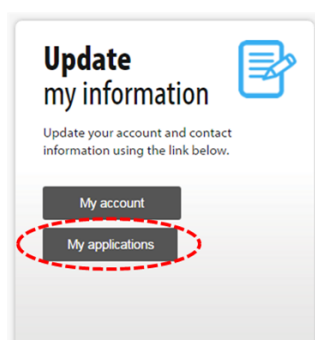


Figure 4. The 'My Applications' button on the Portal homepage.

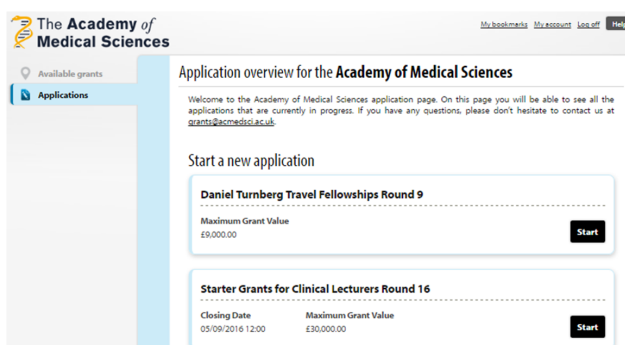


Figure 5. Choosing an application.

After selecting one of our funding schemes, you will be prompted with a page with a number of instructions you're required to read before progressing to the application form. These highlight basic eligibility criteria so please make sure you read them to ensure eligibility. Once you have read these, click to tick the box at the bottom of the page to begin your application.

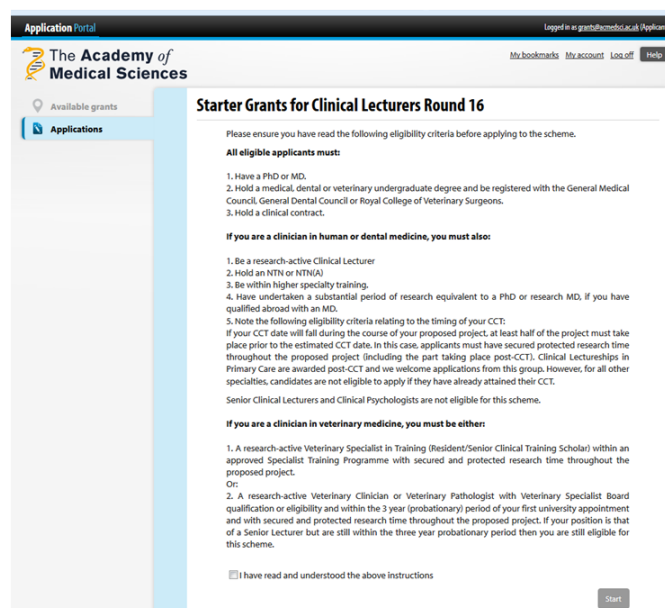
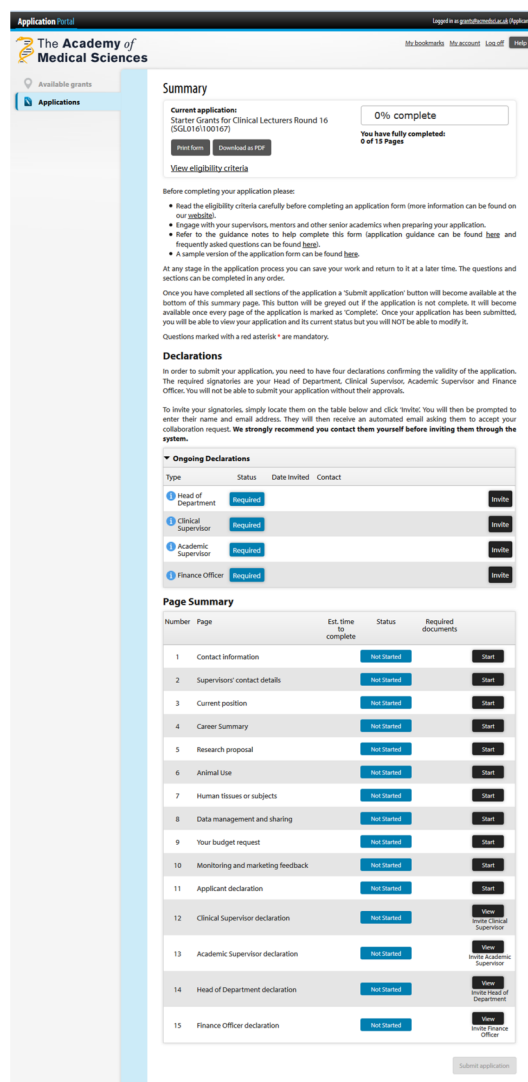


Figure 6. Reviewing the eligibility criteria and starting your application.

Summary page

The summary page gives you an overview of your application form and your progress in completing the form and obtaining the necessary signatures. At any time, you can also print or download your form as a pdf from this page using the buttons in the upper left hand corner; if you wish to download a template of the application form, we recommend that you download this from the link provided in the body of the text instead or from the relevant scheme's webpage. There is also a tracking progress bar in the right hand corner which will increase as you fill in the application. You will only be able to submit once you have reached 100%. Please read the summary instructions carefully as these will be scheme specific and will contain links for extra guidance and tips on writing a successful grant.



Application Portal login My bookmarks My account Log off Help

The Academy of Medical Sciences

Available grants

Applications

Summary

Current application: Starter Grants for Clinical Lecturers Round 16 (SGL016100167)

[Print form](#) [Download as PDF](#)

0% complete
You have fully completed: 0 of 15 Pages

[View eligibility criteria](#)

Before completing your application please:

- Read the eligibility criteria carefully before completing an application form (more information can be found on our website).
- Engage with your supervisors, mentors and other senior academics when preparing your application.
- Refer to the guidance notes to help complete this form (application guidance can be found [here](#) and frequently asked questions can be found [here](#)).
- A sample version of the application form can be found [here](#).

At any stage in the application process you can save your work and return to it at a later time. The questions and sections can be completed in any order.

Once you have completed all sections of the application a 'Submit application' button will become available at the bottom of this summary page. This button will be greyed out if the application is not complete. It will become available once every page of the application is marked as 'Complete'. Once your application has been submitted, you will be able to view your application and its current status but you will NOT be able to modify it.

Questions marked with a red asterisk * are mandatory.

Declarations

In order to submit your application, you need to have four declarations confirming the validity of the application. The required signatories are your Head of Department, Clinical Supervisor, Academic Supervisor and Finance Officer. You will not be able to submit your application without their approval.

To invite your signatories, simply locate them on the table below and click 'invite'. You will then be prompted to enter their name and email address. They will then receive an automated email asking them to accept your collaboration request. **We strongly recommend you contact them yourself before inviting them through the system.**

Ongoing Declarations

Type	Status	Date invited	Contact
Head of Department	Required		Invite
Clinical Supervisor	Required		Invite
Academic Supervisor	Required		Invite
Finance Officer	Required		Invite

Page Summary

Number	Page	Est. time to complete	Status	Required documents
1	Contact information		Not Started	Start
2	Supervisors' contact details		Not Started	Start
3	Current position		Not Started	Start
4	Career Summary		Not Started	Start
5	Research proposal		Not Started	Start
6	Animal Use		Not Started	Start
7	Human tissues or subjects		Not Started	Start
8	Data management and sharing		Not Started	Start
9	Your budget request		Not Started	Start
10	Monitoring and marketing feedback		Not Started	Start
11	Applicant declaration		Not Started	Start
12	Clinical Supervisor declaration		Not Started	View Invite Clinical Supervisor
13	Academic Supervisor declaration		Not Started	View Invite Academic Supervisor
14	Head of Department declaration		Not Started	View Invite Head of Department
15	Finance Officer declaration		Not Started	View Invite Finance Officer

[Submit application](#)

Figure 7. Example application summary page (for our *Starter Grants for Clinical Lecturers* scheme).

Example question page

Figure 8 shows an example of an application form page. All questions marked with a red asterisk (*) are mandatory; you will receive a warning prompt if you have not completed these before moving on to the next page, and you will be prevented from submitting your form if you do not complete them. If you encounter a mandatory text question that is not applicable to you/your project, please enter 'n/a' or 'not applicable' in the response field.

Please note some open text questions have word limits. We strongly suggest that you work offline for sections with large word limits, then copy and paste your text into the box. **Please be aware you will be not be able to copy more than the set word limit and any text in excess of this will be truncated.** Your answers will be saved automatically as you move from one page to the next but the application will time out after prolonged periods of inactivity; using the 'save current page' feature is highly recommended.

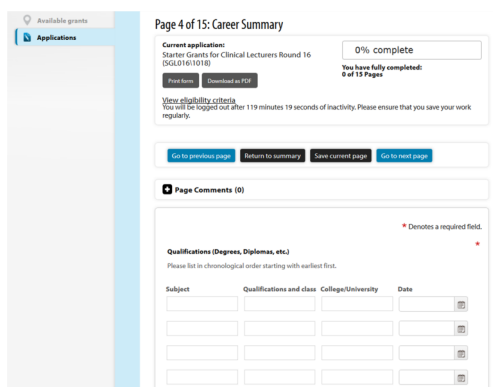


Figure 8. Example question

Adding signatories

Many of our funding schemes require applicants to invite signatories to validate your application before you are able to submit. These will usually be Finance Officers, supervisors, or Heads of Departments but this will differ depending on the scheme you're applying for. Full details of what signatories are required can be found in the scheme guidance notes.

If signatories are required, you will see a declarations box such as the one in figure 9.

It is strongly advised you contact this person first before inviting them through the system. To invite a signatory press the invite button and enter the details of the signatory into the dialog box (figure 10). Please also note that signatories are required to complete their declaration before the application deadline.

Once you have entered the signatory's details they will automatically be emailed an invitation to register with Flexi-Grant. They will then have the opportunity to accept or reject the offer. The link to access your application will expire after 14 days; if this occurs, you can send a new link to the designated signatory using the 'Remind' button. You will receive an email confirmation when an invited signatory has completed their reference.

You can track the status of this section on the summary page. The status of declarations can be:

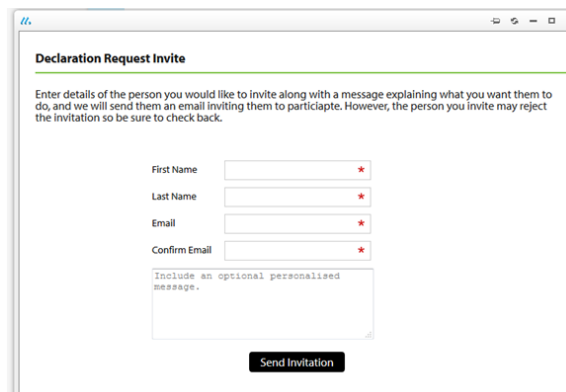
Declarations

In order to submit your application, you need to have four declarations confirming the validity of the application. The required signatories are your Head of Department, Clinical Supervisor, Academic Supervisor and Finance Officer. You will not be able to submit your application without their approvals.

To invite your signatories, simply locate them on the table below and click 'Invite'. You will then be prompted to enter their name and email address. They will then receive an automated email asking them to accept your collaboration request. **We strongly recommend you contact them yourself before inviting them through the system.**

Ongoing Declarations			
Type	Status	Date Invited	Contact
1 Head of Department	Required		Invite
1 Clinical Supervisor	Required		Invite
1 Academic Supervisor	Required		Invite
1 Finance Officer	Required		Invite

Figure 9. Declarations box.



Declaration Request Invite

Enter details of the person you would like to invite along with a message explaining what you want them to do, and we will send them an email inviting them to participate. However, the person you invite may reject the invitation so be sure to check back.

First Name

Last Name

Email

Confirm Email

Include an optional personalised message.

Figure 10. Invitation box

Complete: The signatory has signed off your application.

Rejected: The invitee has rejected their role as signatory. They may or may not give a reason.

Accept/Reject: The invitee has not yet clicked on the link to accept or reject the invitation.

Active: The invitee has clicked on the emailed link but has not yet completed the sign off.

Required: An invitation is required.

Complete

Rejected

Accept /
Reject

Active

Required

Submitting an application

Once all pages of the application are complete **and** all signatories have confirmed their support, the 'submit application' button should become active and will no longer be greyed out. Press the button to submit your application to us; you will receive an automated email confirming that we have received your application.

If the application submission button is still greyed out please verify the following:

Are any applications pages showing :

Not Started

In Progress

- If yes, please go to those pages and ensure that you have answered all mandatory questions, as shown by the red asterisk (*), indicating 'n/a' or 'not applicable' if required.
- Are any declaration pages showing: [Active], [Accept/Reject], [Rejected] or [Required]?
- If 'Active' or 'Pending', please let your invited signatory/ies know that their declaration is not yet complete. We strongly recommend that you contact them in person first; you may re-send them the participation link by clicking the 'remind' button.
- If 'Rejected' or 'Required', please invite someone to complete the necessary declaration.
- If someone who you have already invited becomes unable to provide the declaration/signature, you can cancel the declaration yourself using the 'cancel' button. This will reset the declaration status to 'required' and you will be able to invite another person to act as signatory.

Complete

If all application **and** declaration pages show the status 'Complete' and the 'Submit application' button is still inactive, please contact the Office on 0203 1413 238 or grants@acmedsci.ac.uk.

Status of your application

Once submitted, your application will go through a series of statuses before you are informed of the final funding decision.

Eligibility Checking

Submitted: 07/07/2016
Current Stage: Eligibility Checking

Once submitted, your application will first pass to the 'Eligibility Checking' stage; this is where your application is reviewed by the Office to ensure that it is complete and within the eligibility remit of the scheme.

If your application is ineligible, it will be marked closed (fig) and you will receive an email explaining the reason.

Scoring

Submitted: 07/07/2016
Current Stage: Scoring

Once an application is deemed eligible, it will proceed to the 'Scoring' stage; this stage is where the application is undergoing assessment.

Approval

Submitted: 07/07/2016
Current Stage: Approval

Once the assessment of an application is complete, it will move to the 'Approval' stage. This is the stage where final approval for the funding allocation is granted.

Grant Offer

Submitted: 07/07/2016
Current Stage: Grant Offer

The 'Grant Offer' stage is when an application has been approved and an offer is generated. The second part of this stage, 'Return Due' requires the applicant, and various signatories, to accept and sign the offer form. The applicant must also provide the bank details for the payment of the award; these will usually be the account details of the applicant's institution, although this does depend on the scheme so please refer to the scheme-specific guidance for further information.

Submitted: 07/07/2016
Current Stage: Grant Offer
Offer issued. Return due

Closed : 08/07/2016

Figure 11. Closed grant.

Awarded: 08/07/2016

Figure 12. Awarded grant.

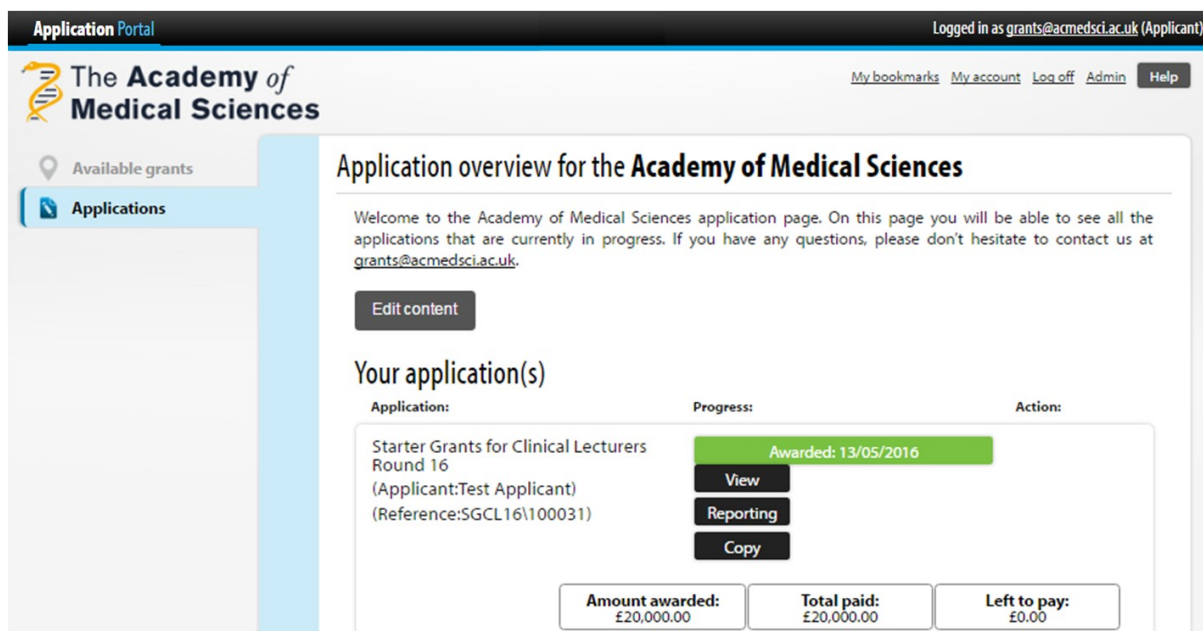
Guidance notes for award holders

Managing and reporting on your grant

Your grant management and reporting, with the exception of outcomes reporting via Researchfish (if applicable to your scheme), will be done through Flexi-grant. Different schemes have different reporting requirements so please refer to the scheme-specific guidance for what is required of you.

In Flexi-grant, both grants management (e.g. no-cost extension or project amendment requests) and reporting (e.g. final expenditure or end of fellowship reports) forms are called reports. The reports applicable to your award will be available to you via the reporting screen. To access this, please log into Flexi-Grant, click on 'Application Portal' and select the reporting button next to your award. (figure 13).

Filling in a report is very similar to filling in an application. To start a report, click on the 'Complete' button next to the report name. Fill in the required fields and, once you have finished, click 'Submit form' on the summary page. If you wish to finish the report at a later date, you can click 'Save current page'.



The screenshot shows the 'Application Portal' interface. At the top, it says 'Logged in as grants@acmedsci.ac.uk (Applicant)'. The left sidebar has a navigation menu with 'Available grants' and 'Applications' (selected). The main content area is titled 'Application overview for the Academy of Medical Sciences'. Below this, there is a welcome message and an 'Edit content' button. The section 'Your application(s)' displays a table with columns for 'Application:', 'Progress:', and 'Action:'. The table shows one application: 'Starter Grants for Clinical Lecturers Round 16' with details '(Applicant:Test Applicant)' and '(Reference:SGCL16\100031)'. The 'Progress' column shows a green bar indicating 'Awarded: 13/05/2016'. The 'Action' column has buttons for 'View', 'Reporting', and 'Copy'. At the bottom, there are three boxes showing financial details: 'Amount awarded: £20,000.00', 'Total paid: £20,000.00', and 'Left to pay: £0.00'.

Application:	Progress:	Action:
Starter Grants for Clinical Lecturers Round 16 (Applicant:Test Applicant) (Reference:SGCL16\100031)	Awarded: 13/05/2016	View Reporting Copy

Amount awarded: £20,000.00	Total paid: £20,000.00	Left to pay: £0.00
-------------------------------	---------------------------	-----------------------

Figure 13. Award and reporting screen

Guidance notes for signatories

Accepting a declaration

This section explains the process of registering and signing off a declaration for an Academy grant application.

When you've been invited to sign a declaration by a grant applicant you will receive an email like the one below:

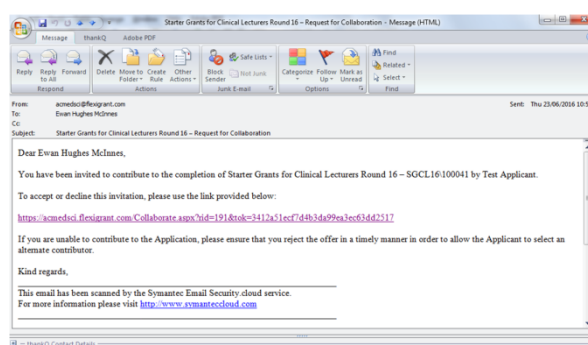


Figure 14. Invitation to be a signatory.

Once you follow the link you will first be asked whether you accept or reject the invitation to act as an applicant's signatory. If you accept you will be asked to either log in or register (if you don't already have an account), then taken to the application page summary. Selecting 'Accept' at this stage will give you access to review the application and does not commit you to approving it; you will still be able to decline signing off the application later on.

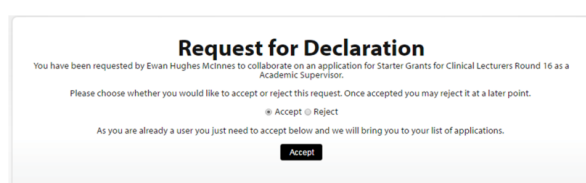
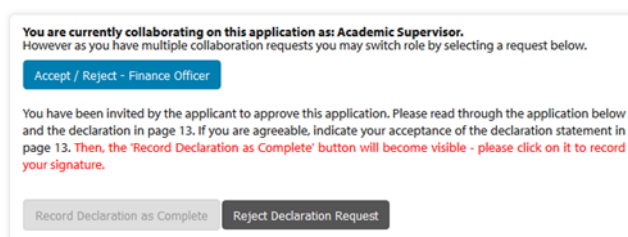


Figure 15. Option to accept or reject role as a signatory.

Signing a declaration

Once you have accepted the request for declaration, you will be able to access and review the relevant parts of the application (figure 15), then approve (or reject) the declaration for your role. Depending on the type of grant, you may also, be required to provide a supporting statement. Once you have completed the declaration section, click 'Return to Summary' and click on "Record Declaration as Complete" to finish.



The screenshot shows a web interface for a declaration page. At the top, it states: "You are currently collaborating on this application as: Academic Supervisor. However as you have multiple collaboration requests you may switch role by selecting a request below." Below this is a blue button labeled "Accept / Reject - Finance Officer". The main text reads: "You have been invited by the applicant to approve this application. Please read through the application below and the declaration in page 13. If you are agreeable, indicate your acceptance of the declaration statement in page 13. Then, the 'Record Declaration as Complete' button will become visible - please click on it to record your signature." At the bottom, there are two buttons: "Record Declaration as Complete" (disabled, grey) and "Reject Declaration Request" (active, dark grey).

Figure 16. Declaration page.

Providing multiple declarations

If you have been asked to fulfil multiple signatory roles (e.g. supervisor and Head of Department) you will be able to switch between roles via the application summary page.