



# Managing your award

A guide to using Flexi-Grant<sup>®</sup> and submitting reporting forms

June 2023



# Grant management

As an Award holder, you are required to manage your Award for its duration. If you have any questions about managing your grant, please contact the staff leads for your scheme, which are identified on the [scheme's webpage](#).

Throughout the duration of your award period should you need to amend your Award in any way you will need to submit a request through our online grant management platform, [Flexi-Grant®](#). Reporting on your Award is completed through [Researchfish](#).

If you are considering making any significant amendments to your research project, you must notify us as soon as possible. Requests must be submitted for approval **in advance** of any amendment taking place. Such requests will be considered on a case-by-case basis. Examples of circumstances under which we should be notified are: change of host institution, change of supervisory arrangements, changes to the use of animals or animal numbers, virement of budgets or significant findings that might lead to altered aims and objectives or major experimental plan changes.

If you would like to extend your Award period, please contact us as soon as possible to discuss a possible time-only no-cost extension to your grant. Requests for extensions should be made **prior** to your award end date, and will be considered on a case-by-case basis.

The following guide will walk you through how to use our Flexi-Grant® system and also explain the different reports that you can submit. If you have any questions please contact the staff leads for your scheme or the Grants Team via [grants@acmedsci.ac.uk](mailto:grants@acmedsci.ac.uk)



# Contents

1. Award amendment requests.....	4
i. No-cost, time only extensions requests.....	5
ii. Periods of absence.....	6
iii. Changes to your aims and objectives.....	6
iv. Virement of funds.....	7
v. Change of host institution.....	8
2. How to: Submit an amendment request [ <b>Flexi-Grant® guide</b> ].....	9
3. Final Expenditure Reports.....	17
4. Underspend.....	18
5. Annual Expenditure Reports ( <i>scheme specific</i> ).....	20
6. Have a question? Contact us.....	21

# Award amendment requests

Prior to making any significant amendments to your Award, you must first submit an award amendment request to us.

**This form should be submitted in advance** of any amendment that affects your research project, **not** retrospectively.

Amendments will be considered on a case-by-case basis. Examples of circumstances under which the Academy should be notified include:

- No-cost, time-only extensions
- Change of host institution
- Change of supervisory arrangements
- Change of major collaborators
- Significant findings that might lead to altered aims and objectives or major experimental plan changes
- Virement of funds between budget headings
- Change in use of animals or animal numbers
- Other, not listed above

# No-cost, time-only extensions requests

If you would like to extend your Award period you can discuss with staff leads the possibility of a no-cost, time-only extension.

We ask that you make as few requests as possible, for each Award and, therefore, encourage you to **wait until three months before your award end date**, so that all factors can be considered and multiple requests for the same Award can be reduced. Please note that all requests for extensions should be made prior to your Award end date. We will continue to consider requests for no-cost extensions on a case-by-case basis.

Examples of circumstances under which the Academy may authorise a no-cost, time-only extension:

- Delayed start date
- Part time working arrangement
- Sick / parental / compassionate leave
- Secondment
- Inaccessibility to e.g. materials, equipment, samples
- To make use of an underspend
- Delay in ethical approval / recruitment
- Other, not listed above

Please note that to request a no-cost, time-only extension, this form should be completed at least one month before the original end date. Requests submitted after this date may not be considered. No additional funds will be made available.

# Periods of absence

Award holders are entitled to take periods of absence from their grant for maternity, paternity and adoption leave as well as periods of long term sickness. Please inform your scheme's staff leads if you plan to or have taken a period of absence during your award.

You may apply for a no-cost extension to your grant to account for time lost due to periods of absence; you must apply for such an extension three months prior to your award end date. Financial supplements to the grant will not be provided.

Should you wish to pause all of your Award activities, i.e. with neither yourself nor any team members working on the project, you may wish to put your Award into abeyance. Please email your scheme's staff leads to discuss if this is a viable option.

# Changes to your aims and objectives

Over the course of your Award you may wish to significantly alter the original experimental plan and activities noted in your application. Prior to making these changes you must first submit a formal request.

At the Panel meeting where your application outcome was decided, the Panel chose to fund your application based on the experimental plan and activities outlined. As such, any changes to these must first be approved by the Panel before being implemented.

# Virement of funds

During your Award you may wish to utilise funds differently to what was originally described in your application. Before doing so you must first formally submit a request to vire funds between budget headings. **Before completing a formal request please refer to advice in the Grant Conditions on eligible costs that can be covered by the Award.**

If you are utilising funds **under the same budget heading** for a similar item then you do **not** need to formally request this change. For example, if you have outlined a specific kit under the 'Consumables' budget heading and you need to purchase a different kit, then, as you are spending within the same budget heading.

If you would like to vire funds **between** budget headings you **will** need to submit a formal request. For example, if you have not used any funds under your 'Travel' budget heading and would like to instead put it towards 'Publications' or 'Consumables'. Within the request, clearly state the value of funds being moved and which headings the funds are moving between. Please note these requests cannot be submitted retrospectively.

If you are unsure about the virement you would like to make please contact your scheme's staff leads before submitting a formal request.

## **Equipment**

If you are a **Springboard or AMS Professorship awardee** and would like to purchase equipment with a value of £10,000 or over, **irrespective** of whether you need to vire funds between budget headings or not, you will need to submit a formal request to use your Award funding in this way. Note that these requests must also be approved by the Springboard Panel.

If you are a **Newton International or Newton Advanced Fellow**, please refer to the detailed advice in the Grant Conditions prior to purchasing any equipment

# Change of host institution

Within the request, you will need to outline the circumstances for wishing to make this amendment and how the move will affect the aims and objectives of your original research project plan.

You need to complete an expenditure table to confirm the award's expenditure to date and the underspend which will need to be transferred to the proposed new host institution.

You will need to upload **a signed letter of support on headed paper** from the proposed *new* host institution to confirm:

- Support for the transfer of the Academy grant to the new institution.
- Necessary facilities and resources are available for the awardee to conduct their originally awarded research proposal.
- The new host institution takes on responsibility for administering the grant.

This letter of support may be provided by the Head of Department (HoD) or Research office of the new host institution.

If request is approved, the new institution must sign up to the Academy's Award/Grant terms and conditions.

In addition to usual signatures (please refer to slide 16 for details), signatures are also required from the academic supervisor/HoD and research/finance office representative of the *new* host institution.



# How to: Submit an amendment request

The Academy of  
Medical Sciences

Application Portal



? ↓ EC

Welcome to the Academy of Medical Sciences' grant management system



The Academy of Medical Sciences is the independent body in the UK that represents the diverse spectrum of medical science, from basic research through clinical application to healthcare delivery. Our mission is to promote medical science and its translation into benefits for society.

The Academy's Flexi-Grant® enables users to apply for, and manage, Academy grants and programmes online.

Please read the relevant [Grant Schemes pages for further details](#) about our application process and eligibility criteria.

If you are new to the system you can easily register by clicking the button below. Once logged in, please select the 'Mv account' button below and then select 'Available grants' from the

To submit an amendment request, first login to your [Flexi-Grant®](#) account.

Once logged in, go to 'Application Portal'

Once in your application portal, toggle to 'My applications' in the left-hand side menu

[Flexi-Grant®](#)



The Academy of  
Medical Sciences

My account

My contact details

Available grants

My applications

My downloads

## Application overview for the Academy of Medical Sciences

Welcome to the Academy of Medical Sciences application page. On this page you will be able to see all the applications that are currently in progress. If you have any questions, please don't hesitate to contact us at [grants@acmedsci.ac.uk](mailto:grants@acmedsci.ac.uk).

### Your award(s)

[Redacted]

Complete : 09/03/2023

Grant: Starter Grants for Clinical Lecturers [Redacted]

Project: [Redacted]

Applicant: [Redacted]

Organisation: [Redacted]

View

Reporting

This page will display all of your applications to the Academy. Find the Award you would like to report on and click 'Reporting' on the far right of the Award details.

- My account
- My contact details
- Available grants
- My applications
- My downloads

## Reports & activities for: Starter Grants for Clinical Lecturers

- [Redacted]
- [Redacted]
- [Redacted]

Updated by: [Redacted]

Awarded
 Complete

### Reporting Forms - progress reports, monitoring & other forms

Reporting forms relating to this grant are listed. Please complete any outstanding forms, or you can submit a new form.

New form

Name	Date Due	Assigned to	Status	Submitted by	
Amendment request (Reporting) (1)		[Redacted]	Accepted	[Redacted]	⋮
Amendment request (Reporting) (2)		[Redacted]	Accepted	[Redacted]	⋮
Final Expenditure Report (Reporting)		[Redacted]	Accepted	[Redacted]	⋮

You will now be presented with a summary of all reports associated with this Award. The summary table shows, from left to right, the report name, the due date assigned by staff leads if returned to you for editing, the person the report is currently assigned to, the status of the report and who submitted the report.

To start a new request, click 'New form'

- My account
- My contact details
- Available grants
- My applications
- My downloads

## Reports & activities for: Starter Grants for Clinical Lecturers

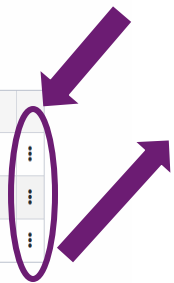
☰ Awarded
☑ Complete
Updated by: [REDACTED]

### Reporting Forms - progress reports, monitoring & other forms

Reporting forms relating to this grant are listed. Please complete any outstanding forms, or you can submit a new form.

[New form](#)

Name	Date Due	Assigned to	Status	Submitted by	
Amendment request (Reporting) (1)			Accepted		⋮
Amendment request (Reporting) (2)			Accepted		⋮
Final Expenditure Report (Reporting)			Accepted		⋮



View Form

---

Print Form

---

Complete Form

---

Delete

To the far right of each report are three vertical dots, please use these to make changes or to view your report.

To **edit** the request, please choose '**Complete** Form'  
 To simply **view** the report, please choose 'View Form'

## Create or schedule a reporting form

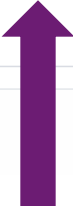
Close

Forms

Choose reporting form option:

Amendment request ▼

Save form



Once you have clicked 'New Form', a pop up will then appear asking you to choose which reporting form you would like to pick. For amendment requests please choose the 'Amendment request' form then click 'Save form'

- My account
- My contact details
- Available grants
- My applications
- My downloads

## Summary

Amendment request (3)  
 Starter Grants for Clinical Lecturers

Officer: [Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

Not started

View eligibility criteria | Print | Download as PDF

0 out of 2 pages 0% complete

*This form should be submitted in advance of any amendment that affects your research project, not retrospectively.*

**Amendments will be considered on a case by case basis.** Examples of circumstances under which the Academy should be notified include:

- No-cost, time only extensions
- Change of host institution
- Change of supervisory arrangements
- Change of major collaborators
- Significant findings that might lead to altered aims and objectives or major experimental plan changes
- Virement of funds between budget headings
- Other

Example

- Delay

Number	Page	Est. time to complete	Status	Required documents	
1	Award and amendment request details		Not Started		Start
2	Signatures		Not Started	0 / 1	Start



Once you have started a request form you will be taken to the main page of the report. Here you will find instructions pertaining to your particular Award.

At the bottom of this page are the two sections to complete: the request itself and the signatures page.

Click the 'Start' button to complete your request form

Project start date (as stated in your grant acceptance form) \*

Current project end date \*

\* What is the nature of your change request?

Please note: your answer to this question will modify the guidance you are given in the following question, so please ensure this is correct.

Please Select...

\* Are there any financial implications of this change?

Yes

No

\* Please provide c

**What is the nature of your change request?**

Please note: your answer to this question will modify the guidance you are given in the following question, so please ensure this is correct.

Please Select...

Please Select...

No-cost, time only extension

Amendment to host institution, supervisory arrangements or major collaborations

Amendment to aims and objectives, or experimental plan

Career break

Other, not listed above

You have entered 0

[Return to Summary](#)

[Save progress](#)

[Next page >](#)

At the start of the request form you will be asked to select the type of amendment you would like to make.

Please note that the form is responsive and your answers will alter the subsequent questions. Once you have selected the type of amendment, please complete the form as appropriate.

If you would like to request a no-cost time-only extension in addition to another amendment such as a virement, please select 'No-cost, time only extension' and describe the other request within the subsequent text boxes.

Number	Page	Est. time to complete	Status	Required documents
1	Award and amendment request details		Not Started	Start
2	Signatures		Not Started	0 / 1 Start

'Start' the Signatures page and enter details of the relevant signatories.

### Page 2 of 2: Signatures

Amendment request (4)  
 Starter Grants for Clinical Lecturers f [redacted]  
 [redacted]  
 Officer: [redacted]  
 [redacted]  
 [redacted]

⌚ Session timeout: 1:58:57 In Progress

[View eligibility criteria](#)
[Print](#)
[Download as PDF](#)

0 out of 2 pages 0% complete

Required signatories include award holder, academic supervisor (if applicable), Head of Department and Finance/Research office representative.

For *International awards*, further signatories are co-applicant (if applicable), and overseas institution academic supervisor/Head of Department and research/finance office representative (if applicable).

#### Signatures

Signatures of the Award Holder, the Academic Supervisor or the Head of Department and the Research or Finance Office are required to accompany the submission of this extension request.

To provide the necessary signatures, please download a PDF copy of this form (click 'Download as PDF' at the top of the page), print, obtain written signatures (not typed) using the designated tables below and upload a signed version of this form here.

Choose your file(s) or drag and drop files here to upload

File name	Date uploaded	Action
-----------	---------------	--------

Only wet signatures or software validated e-signatures are accepted. *Please note that typed out 'signatures' will not be accepted.*

To add signatures, click 'Download as PDF' at the top of the page. Signatures can be added to the PDF version of your request form and then a fully signed form can be scanned (if necessary) and saved ready for upload.

Click 'Choose your file(s)' to upload the signed and dated form. *Please note that the request form uploaded must be identical to the digital version.*



# Final expenditure reports

To close your award, you must complete a Final Expenditure Report. This report must be submitted within three months of your Award end date, as stated in your Award/Grant Conditions. This report should be submitted via [Flexi-Grant®](#), with the following exceptions:

- *Holders of the Daniel Turnberg UK/Middle East Travel Fellowship* must instead complete an End of Grant Report ([available to download on scheme webpage](#)) within six weeks of completion of their visit.
- *Holders of the Hamied Foundation UK-India AMR Visiting Professorship* must instead complete an End of Visit Report within 6 weeks of completion of the visit. The scheme's staff leads will provide this to you via email.

If you have received a costed extension to your award, you will be prompted to provide this information separately within the report template.

## Underspend

Depending on your Award, you may need to return any unspent funds to the Academy. If you would like to utilise these remaining funds, please instead submit a no-cost, time-only extension request; this should be submitted prior to the end of your Award.

Please refer to your Award/Grant Conditions to read the specific details for your scheme. **Please do not return any unspent funds until your Final Expenditure Report has been approved by the Academy.**

To submit a Final Expenditure Report, please refer to pages 9 to 16 as the process is similar to that of an 'Amendment request' submission. However, when asked to select a reporting form please choose 'Final Expenditure Report' then click 'Save form'.

## Create or schedule a reporting form

Close

Forms

Choose reporting form option:

Amendment request

Final Expenditure Report

Save form

Please refer to pages 12 to 16 for a guide of how to navigate the different pages of the form, including the Signatures page.

Final Expenditure Report (1)  
Starter Grants for Clinical Lecturers Round

Not started

[View eligibility criteria](#) [Print](#) [Download as PDF](#)

0 out of 3 pages 0% complete

Number	Page	Est. time to complete	Status	Required documents	
1	Award details and grant expenditure		Not Started		<a href="#">Start</a>
2	Signatures		Not Started	0 / 1	<a href="#">Start</a>
3	HIVE programme membership		Not Started		<a href="#">Start</a>

## Grant expenditure

Please detail below the items that your grant was awarded for and the total amount now spent.

You must report under the budget headings and values which were set out in your original application, or in line with budget changes during the course of your award which were agreed via an amendment request.

If you have received a costed extension to your award, you will be prompted to provide this information separately.

Item	Total amount budgeted	Total amount spent
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Totals	0.00	0.00

\* Provide a brief explanation for any significant variance between your original plans and actual expenditure.

Have you previously been granted a costed extension to your Academy award?

Please select "no" if you have received a no-cost extension only.

Yes

No

\* Underspend

Please state the value of any remaining unspent funds.

You will be asked to detail your grant expenditure. Please note that the 'Total amount budgeted' column must be identical to that presented in your original application, i.e. each item listed and the total amount budgeted must be the same as that shown in your application's budget table.

In the free text box below the table please explain any variations between your 'budgeted' and 'spent' totals. Please include details of any virement requests that been approved by the Academy.

If you have received a costed extension to your award, you will be prompted to provide this information separately within the report template.

# Annual expenditure reports

[Scheme specific]

If you are a holder of a/an:

- *Newton Advanced Fellowship*
- *Newton International Fellowship*
- *AMS Professorship*

In addition to the Final Expenditure Report you will also need to submit an Annual Expenditure Report after each year prior to award end date. For example, if you hold a two year Award you would submit an Annual Expenditure Report in Year 1, and a Final Expenditure Report in Year 2.

Much like the Final Expenditure Report you will be expected to reflect on your expenditure from the previous year, comparing it to the amount budgeted in your original application budget. You will also need to explain any significant variations between your original plans and the actual expenditure.

Annual Expenditure reports should be submitted via [Flexi-Grant®](#).

# Have a question?

Please reach out to the staff leads for your scheme who will be more than happy to help. You can find your team via our website:

- [AMS Professorships](#)
- [Clinician Scientist Fellowships](#)
- [Daniel Turnberg Travel Fellowships](#)
- [Global Challenges Research Fund Networking Grants](#)
- [Hamied Foundation UK-India AMR Visiting Professorships](#)
- [Newton Advanced Fellowship](#)
- [Newton International Fellowship](#)
- [Springboard](#)
- [Springboard – Health of the Public 2040](#)
- [Starter Grants for Clinical Lecturers](#)