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1  ABOUT THIS DOCUMENT
This document describes how to register as a user of the CCGT Grant Application System, and how to use the system to apply for a grant.

2  REGISTRATION
The login page of the portal is shown below:

![Registration and Login Page](image)

2.1  FOR APPLICANTS NEW TO OUR ONLINE APPLICATIONS SYSTEM
Only registered users of the system may apply for grants. Please click [Register](#) and follow the on-screen instructions to complete the registration process.

You may find the following notes useful:

- You will use the email address you register with to identify yourself to the system when logging in.
- The system will use this email address for all correspondence, so it’s a good idea to choose an address you use regularly.
- When you register, an email will be sent to you to allow you to confirm the registration and log in for the first time.
- Don’t worry if you move to a new email address in the future – you can change your registered CCGT email address later.
- If you’re a grant holder, or if you’ve previously contributed to an application or review, your email address may already be registered. The system will detect this automatically and will invite you to log in without needing to re-register.
2.2 PASSWORD STRENGTH
The default password complexity has been aligned with industry best practice. The requirement is:

- a minimum of 8 characters;
- and must contain 3 of the following 4 criteria:
  - upper case letter,
  - lower case letter,
  - a symbol (such as $!%&@#, etc),
  - a digit (0 to 9).

2.3 FORGOTTEN PASSWORD
If you forget your password, click the Forgotten Password? link on the Registration Page (Figure 2.1 Registration and Login Page). At both registration and when resetting a password for Portal accounts, CC Grant Tracker sends an email containing a unique/single-use/short-expiry hyperlink that will let you change the password. This hyperlink will expire after a pre-defined number of days.

2.4 ACCOUNT LOCK OUT
Persistent use of an incorrect password will lock your account; this is to protect you from attempts to access your data by a third party. If this happens you can request a new password via the ‘Forgotten password’ function.

3 USING CC GRANT TRACKER

Figure 3.1 CC Grant Tracker Portal Home Page

The home page is your starting point to create applications, update personal details and add professional/academic CV information.

It is also where you as a grant holder can manage your grants, and as reviewer participate in the review process.
4 CREATING AND COMPLETING A GRANT APPLICATION

4.1 AN OVERVIEW OF THE CREATION AND PREPARATION OF A GRANT APPLICATION

1. The Lead Applicant must be the one who creates the application, but it may be jointly completed by the Lead Applicant and co-applicants.
2. If a co-applicant is added in an application, CCGT will automatically email them to invite their participation. Co-applicants can decide whether to accept their inclusion, and later to consent to the application being submitted jointly in their name.
3. Applicants and co-applicants can manage their CVs in “My Details”. The CVs are automatically included in application submission.
4. When the application form is complete it must be validated prior to submission. This is an opportunity for the grant officer to check the contents of the application and edit as required.
5. Signatories must be selected as part of the application. Their approval is necessary to allow the application to be submitted.
6. When the application is submitted for approval, emails are sent to the signatories (each in turn where there is more than one) informing them that their approval is requested. The Lead Applicant may follow the progress of the approval process on the grant summary page.
7. When the application is approved by all the signatories it joins the submitted queue in the console, and will be available for consideration for funding. A confirmation email is sent to the Lead Applicant.

4.2 CREATING A GRANT APPLICATION

You can create a new application from the link on the home page, or by clicking New Application on the “My Applications” screen.

![New Applications Page](Figure 4.1 The New Applications Page)
1. The new applications page is opened by clicking the link under “New Grant Applications” on the home page, or from the “My applications” screen.

2. All the open grant funding rounds currently are listed. The More info link returns a description of the grant round. Clicking Apply allows you to create an application form; there may be some initial verification questions to ensure that you are eligible to apply for the round.

4.3 COMPLETING A GRANT APPLICATION

Figure 4.2 Completing an Application

- The sections of the application form are normally listed as a menu on the left-hand side of the screen. To complete the application all mandatory questions in each section must be completed.
- You can move from page to page using the Previous and Next buttons, or using the menu on the left-hand side. Any of these buttons also save your input.
- There may also be a Save button to allow you to save and stay on the current page.
- You can save and return to the application form as often as you like.
- The final page of the form is for validation where you are prompted to complete all mandatory fields.
- The system will warn you if your co-applicants are accessing the same page as you. However, you may override this warning by clicking continue. Hence, it is important to work with your co-applicants to ensure that work is not overwritten inadvertently.
5 MANAGING AN APPLICATION

Figure 5.1 Managing an Application

If you select an application from the “My Applications” page or exit by clicking Save and Close, you can manage it, as shown above.

The boxes on the right enable you to:

- **Edit** the application on return visits
- **View the application** as a PDF. This creates a form with your latest edits for you to review or to create a paper copy. The pre-submission watermark is cleared after a successful submission.
- **Validate** that your application is complete for submission.
- **Submit the application** for approval – this button is only available when validation has been successfully completed.
- **Delete the application** if you wish to. **Note that this is an irreversible action**; the application cannot be recovered after deletion.
The menu items on the left:

- **View history** – shows the changes made to the application form, this can be useful for the review of changes made by collaborators.
- **Journal** - is a notepad function allowing collaborators to leave messages and/or attachments.
- **Sign-off status** - reports on the progress of the sign-off process by each of the signatories.

### 5.1 Monitoring the Status of an Application

<table>
<thead>
<tr>
<th>Reference</th>
<th>Title</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>GT10299</td>
<td>Preventive Medicine</td>
<td>19/04/2018 17:13:40</td>
<td>Submitted</td>
</tr>
<tr>
<td>GT10258</td>
<td>Vaccine Trial for Ebola</td>
<td>14/04/2018 19:29:12</td>
<td>Submitted</td>
</tr>
<tr>
<td>GT10267</td>
<td>Florence Nightingale Fellowship Programme</td>
<td>14/04/2018 19:28:49</td>
<td>Submitted</td>
</tr>
<tr>
<td>GT10265</td>
<td>Clinical Fellowship</td>
<td>14/04/2018 19:28:08</td>
<td>Submitted</td>
</tr>
<tr>
<td>GT10300</td>
<td>Screening for chronic heart disease</td>
<td>13/04/2018 12:25:57</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

*Figure 5.2 Application Statuses in "My Applications"

All grant applications, and their statuses, are listed on the “My Applications” section of the system.

### 6 Submission and Beyond

1. After successful validation the Lead Applicant may **Submit** the application. It will then be routed to each of the signatories for their approval.
2. If a signatory rejects the application the lead applicant will be notified, along with any feedback the signatory has supplied.
3. The application can then be re-submitted; depending on configuration it will be returned to the signatory who made the rejection or all signatories and continues through the approval process as before.
4. On completion of the final approval:
   a. A submitted grant reference is assigned to the application.
   b. The application automatically enters the process of being considered for funding, which begins after the grant round closes.

#### 6.1 Feedback from Peer Review and the Funding Decision

Following the closing date of the grant round, submitted and approved applications for that round will be peer reviewed to decide their suitability for funding, and lead applicants will be informed of the outcome of this process in due course.

#### 6.2 Invitations, Reviews and Panel Meetings

You can manage your invitations, reviews and panel meetings directly from within CCGT, in the “My Reviews” section.
6.2.1 INVITATIONS TO REVIEW

If you are invited to review an application, you will receive your invitation by email, as shown below in Figure 6.2. Invitation emails contain a link which allows you to accept or decline the invitation.

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**** CC Grant Tracker Guidance Document

Figure 6.1 My Reviews

Figure 6.2 A Review Invitation Email
6.2.2 RESPONDING TO AN INVITATION

You can accept or decline an invitation, or alternatively you can tentatively accept the invitation – if you would like to carry out the review but for some reason you are not confident you will have the time or opportunity to do so.

If you respond tentatively, this means you permit the grant-making organisation to send you the review if they choose (for example, if they have difficulty finding another suitable reviewer). At this point, if you still cannot do the review, you may indicate this.

6.2.3 PEER REVIEWS AND PANEL REVIEWS

If you accept an invitation to review an application, or if you have agreed to participate in reviews generally, for an organisation, you will be sent details about the review(s) by email.

6.2.4 CARRYING OUT A REVIEW

As a reviewer, you will be asked to examine the application in detail, and give your assessment of the application’s potential (see the example in Figure 6.4). A reviewer may be asked to: provide remarks; give a recommendation; and suggest the names of independent referees etc.
6.2.5 PANEL MEETINGS

You may also be asked to attend a panel meeting to discuss a number of applications. Again, you will be notified of requests to attend via email.

As a meeting attendee, you may be asked to review specific applications involved. The example in Figure 6.5 shows the list of current meetings which the reviewer is being asked to attend; Figure 6.6 shows the applications for one of the meetings.
Figure 6.5 Review Meetings

<table>
<thead>
<tr>
<th>RD</th>
<th>Application Details</th>
<th>Lead Applicant Institution</th>
<th>Fellowship Institution</th>
<th>Research Area</th>
<th>Role</th>
<th>Rank</th>
<th>Score</th>
<th>Documents</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GT10206 Houghton</td>
<td>Ms Applicant Houghton</td>
<td>Bath Spa University</td>
<td>Neuroscience, Physiology, Biophysics, and Pharmacology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>GT10272 Hartnell</td>
<td>William Hartnell</td>
<td>KU Leuven</td>
<td>Genetics and Molecular Biology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>GT10273 Roland</td>
<td>Laila Roland</td>
<td>Edinburgh Napier University</td>
<td>Genetics and Molecular Biology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>GT10276 McGill</td>
<td>Karen McGill</td>
<td>Loughborough University</td>
<td>Genetics and Molecular Biology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>GT10276 Hughes</td>
<td>Adam Hughes</td>
<td>Stoke Mandeville Hospital</td>
<td>Genetics and Molecular Biology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>GT10277 Perron</td>
<td>Dr. Marilyn Perron</td>
<td>Teesside University</td>
<td>Neuroscience, Physiology, Biophysics, and Pharmacology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>GT10261 Kennedy</td>
<td>Greta Kennedy</td>
<td>University of South Wales</td>
<td>Cell and Development Biology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>GT10264 Wilson</td>
<td>Gail Wilson</td>
<td>KU Leuven</td>
<td>Mathematical Biology, Biostatistics, and Epidemiology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>GT10267 Burns</td>
<td>Harry Burns</td>
<td>University of Glasgow</td>
<td>Genetics and Molecular Biology</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 6.6 Applications in a Panel Meeting
Points to note:

- Attendees may view documents describing each application, as well as any prior review outcomes for the application, for information.
- The set of applications and reviews for the entire meeting may be downloaded using a link at the bottom of the page.
- Your access to the materials for a particular application may be restricted, where conflicts of interest have been identified.

## 7 CO-APPLICANTS AND SIGNATORIES

### 7.1 CO-APPLICANT / SIGNATORY REQUEST EMAIL

If you are invited to participate in an application as co-applicant or signatory, you will be informed about this by email, as shown in Figure 7.1.

If you click on the link in this email, you will be taken to a page where you can accept or decline this invitation.

![Co-applicant/Signatory Email](image)

*Figure 7.1 Co-applicant/Signatory Email*

### 7.2 MY CO-APPLICATIONS

If you are invited to participate in more than one application, you can manage your invitations in the “My Co-applications” section, as shown in Figure 7.2.
### 7.3 RESPONDING TO AN APPLICATION

To respond to an application, select it in the “My Co-applications” section. You will then be able to examine the application’s details, to allow you to decide how to respond. When you have made your decision, click Approve or Reject as appropriate.

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**Contact us**

If your query is not answered in these notes you may email us by selecting the Contact Us link within the Grant Application System.

Additionally, if you are experiencing any technical problems please use the same link. We will endeavour to answer all queries within 2 working days.