Using the Dunhill Medical Trust's Grants Management Portal
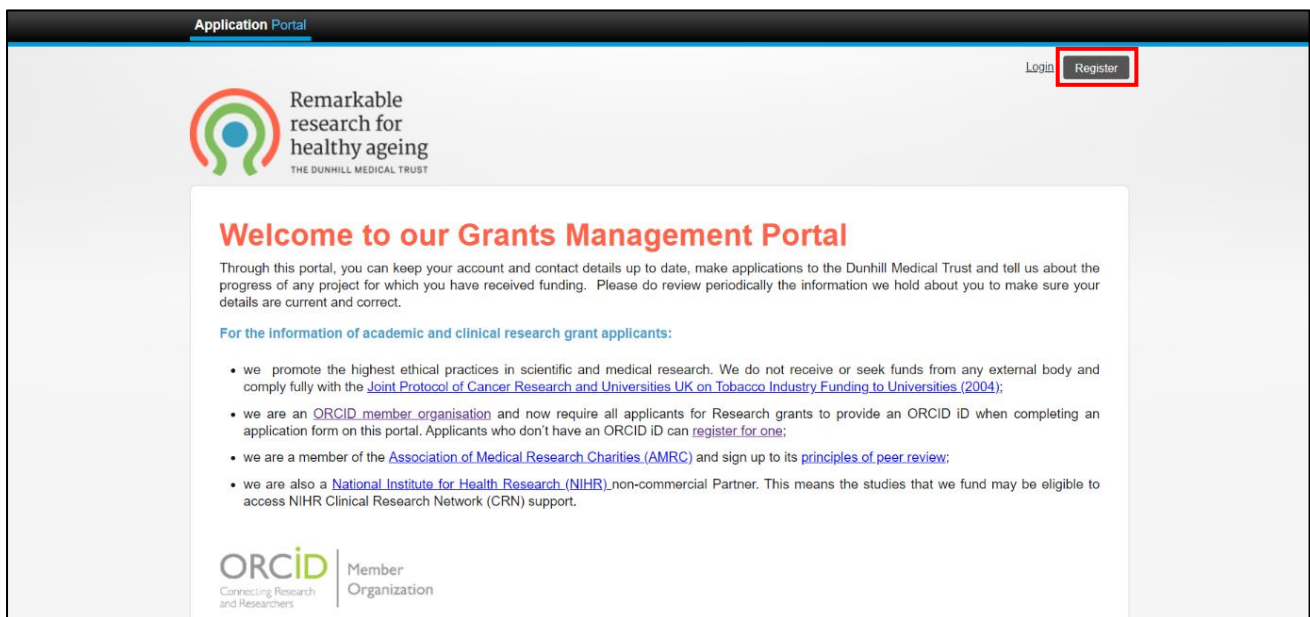
A "how to" guide for applicants and external participants

Contents

Registering for an account and navigating the system

We use an online application system and if you wish to apply for a grant, you will need to create an account on the system. To do so, visit the portal homepage and click the **Register** button in the top right of the screen.

Before providing your details, you'll be asked to read our Privacy Notice and to consent to us using your personal data. Following this, you will then need to provide your contact details and a password in order to register.

Please note that the information relating to ORCID is only relevant to researchers applying for research grants. Once you've entered in your details, you should then receive an email requesting that you confirm your account.

Once you've registered and confirmed your account, you have the ability to complete your account profile by selecting and completing the **My account** and **My contact details** tabs.

The information saved here will then be used to automatically populate the relevant parts any future application forms.
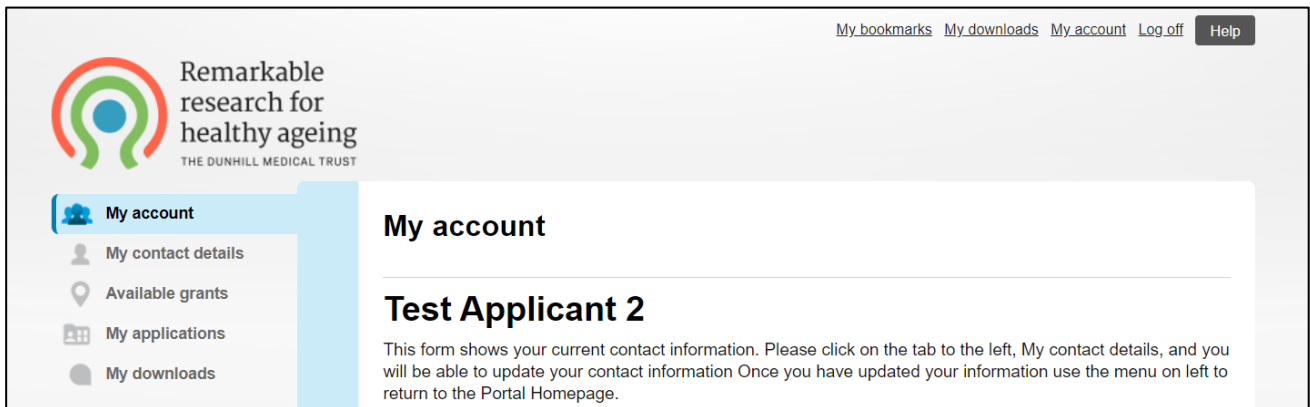
Clicking on the **Available grants** tab will show you any open schemes to which you can potentially apply. The **My applications** tab will show you a list of all applications in which you have a role (either as Principal Investigator/lead applicant or otherwise) that are currently in progress.

Starting and filling out an application

To start a new application, go to the **Available grants** tab of your account and click **Start** next to the scheme you wish to apply to.
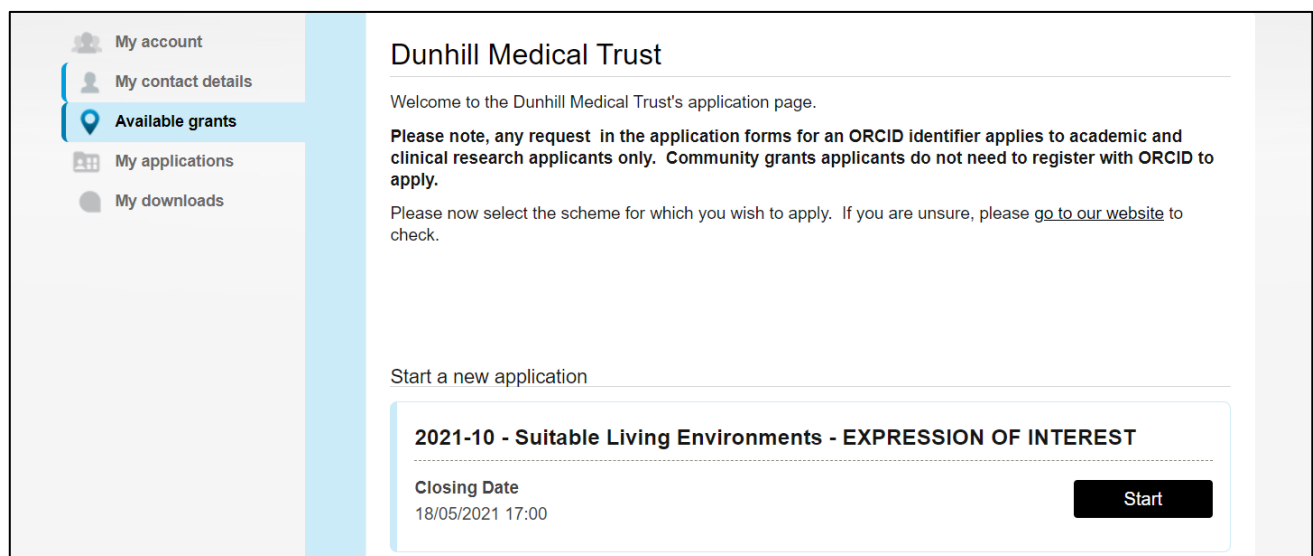
Before starting your application, you'll be shown a page which provides details on the scheme and instructions on completing an application. You'll need to confirm that you have read and understood these instructions before proceeding any further.
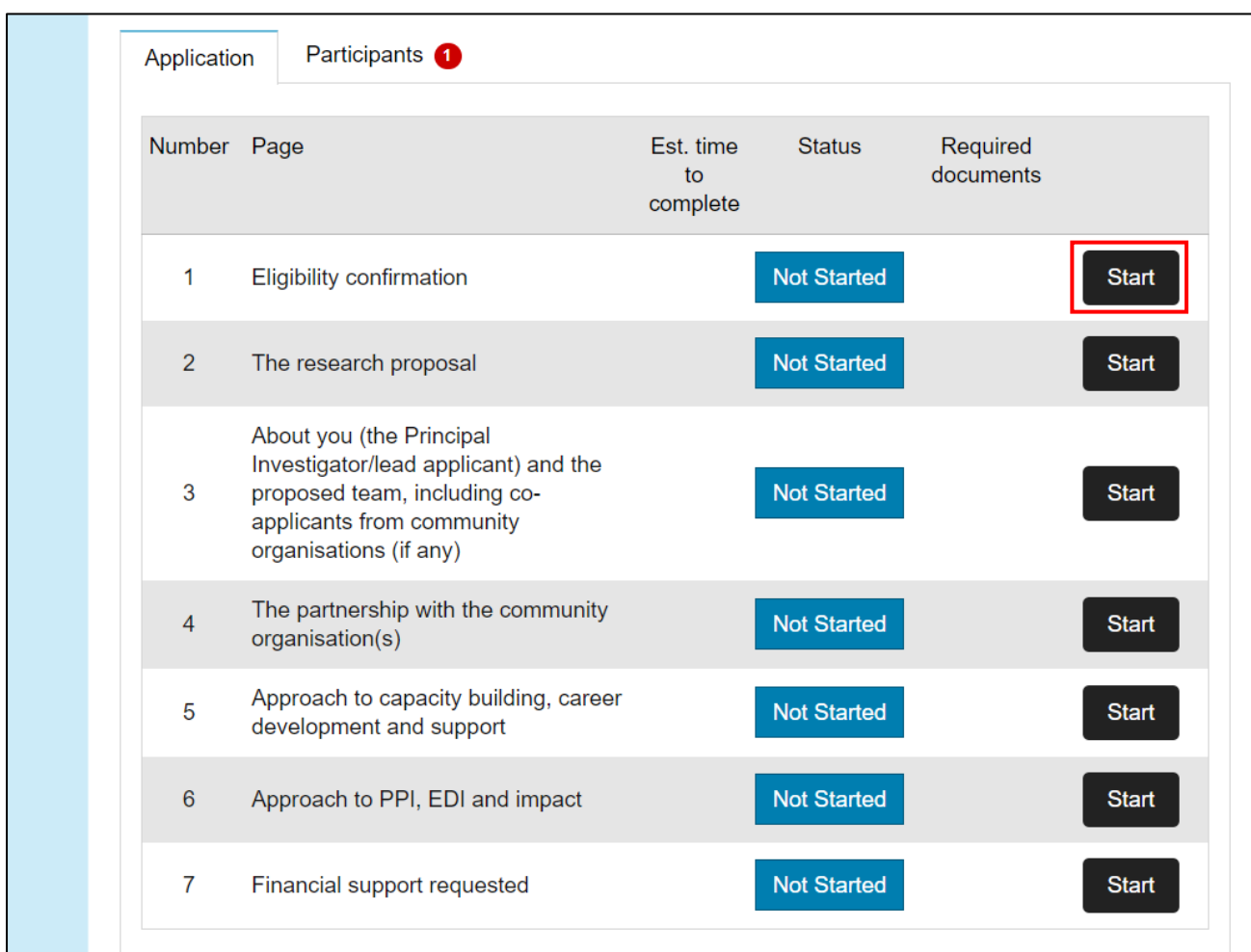
Following this, you'll reach the summary page for your application. This includes a list of all of the sections that need to be completed as part of your application, in the **Application** tab, along with the status of each section (Not Started/In Progress/Complete). Except in specific cases, the lead applicant typically has permission to view and edit all sections of the application. At the top of the summary page you'll find some useful information relating to the call and the completion of your application, so **please read this prior to starting any sections of the form**.

To begin completing a section, click **Start** next to it.

Note that the above image is just an example, and that each form will look slightly different.

Once you've started a section, its status will change from "Not Started" to "In Progress". We strongly recommend that you save your work regularly using the **Save progress** buttons found at the top and bottom of each section of the application form. Once you've completed a section (i.e. provided answers to any mandatory questions, as indicated by an *) its status will change from "In Progress" to "Complete".
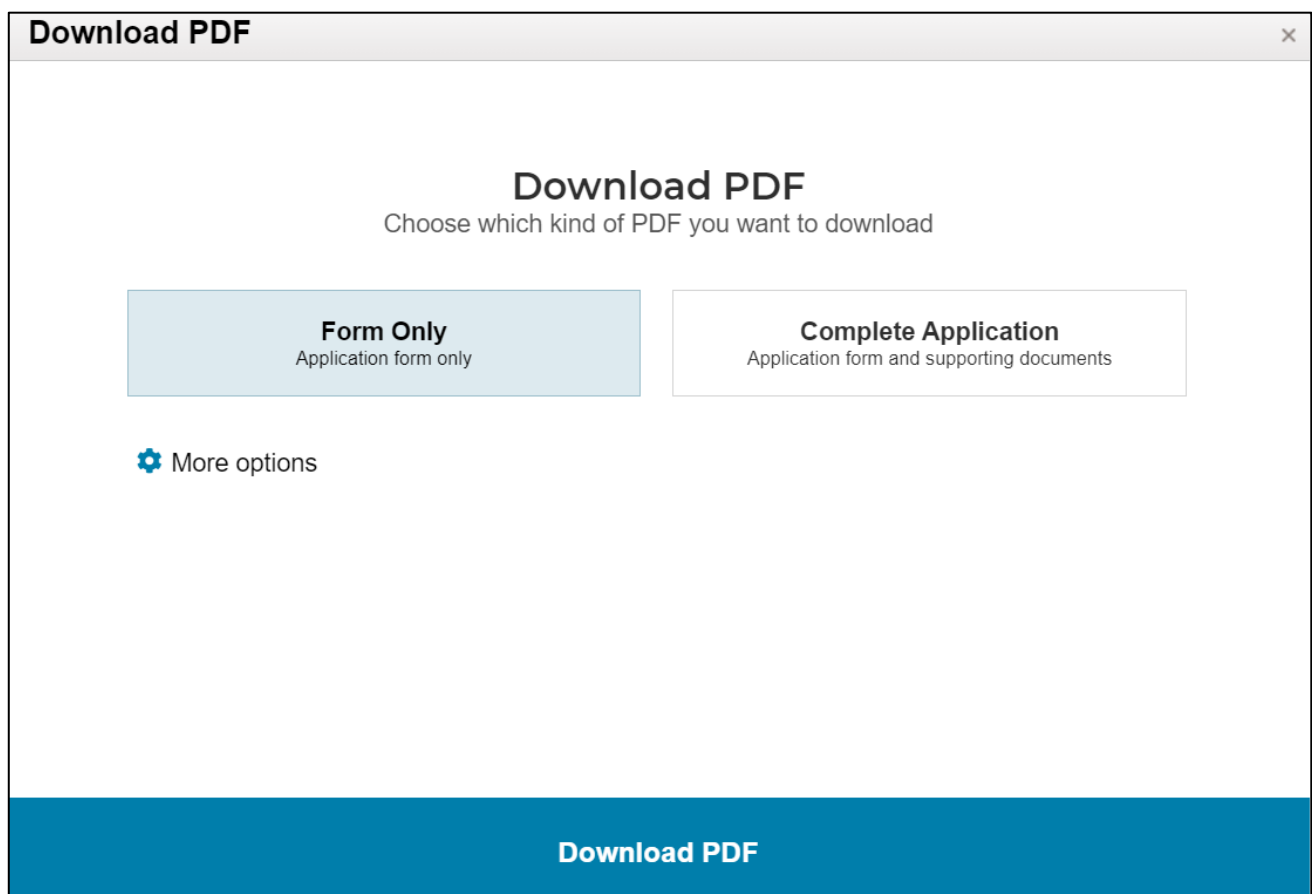
Resuming an application you have already started

To return to an application you have already started, go to the **My applications** tab of your account and click **Resume** next to the application in question.

Downloading a PDF copy of your application

Please note that it is not possible to download a PDF copy of your application once it has been submitted, so we advise doing this before submitting your application.

You can download a PDF version of your application at any time by clicking the **Download as PDF** button at the top of the application summary page. A pop-up will then appear, asking you which kind of PDF you wish to download.

If you want your PDF to include the guidance notes used in the application, click **More options** and then check the box that says **Show guidance notes**.

Once you've clicked the **Download PDF** button, your PDF will be created (this may take a few moments). Once it's ready, you'll receive a notification enabling you to download it.

Inviting external participants to contribute to an application

Note that this section is intended for lead applicants looking to inviting external participants to contribute to their application. If you are an external participant who has been invited to contribute, see the "Contributing to an application as an external participant" section of this document.

For some schemes, the lead applicant has the ability to invite external participants to contribute to an application. In some cases, this is a requirement and the application cannot be submitted until the external participant(s) has/have completed their contribution. Details of which external participants can be invited – and whether this is required or optional – will be provided in the call guidance documentation, so please read this carefully.

In order to invite external participants as the lead applicant, go to the application summary page and click on the **Participants** tab. The red circle containing a number (as shown in the image below) indicates the number of external participants who are required to contribute to the application before its submission.
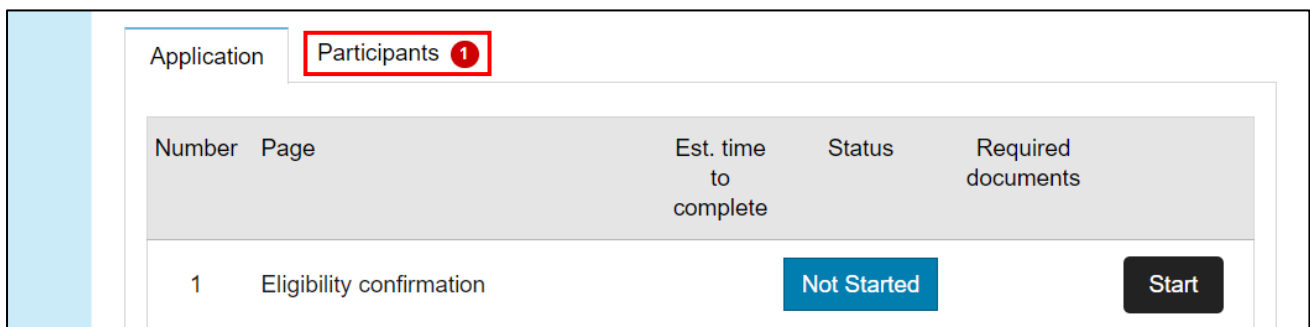
The **Participants** tab contains a list of the different external participants who can be invited, along with a status (Optional/Required) indicating whether they are required to contribute to the application before its submission. Hovering over the ⓘ symbol next to an external participant provides information on what sections of the application they can view and edit.
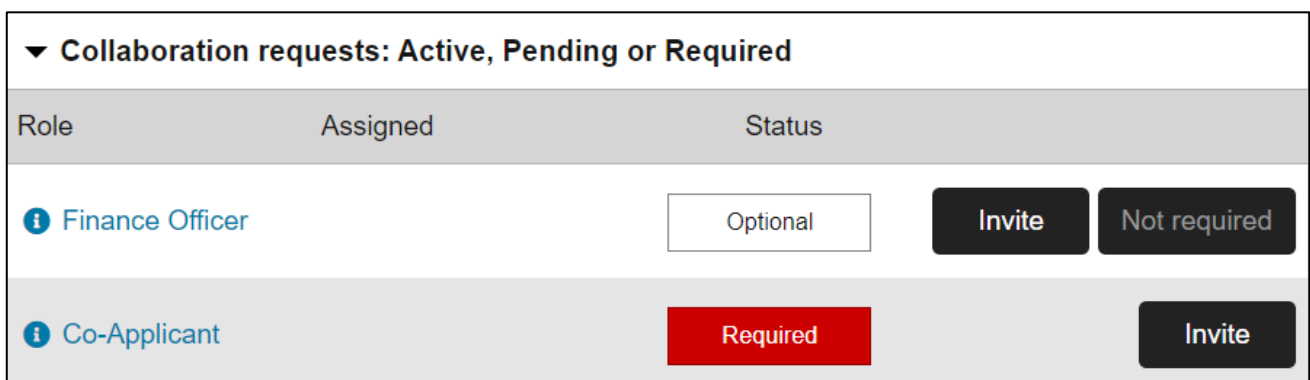
To invite an external participant to contribute to the application, click the **Invite** button. You will then be asked to enter their contact details and, optionally, a personalised message explaining what you want them to do. Once you have done this, click **Send Invitation**. The external participant should then receive an email containing your message (if included) and a link to either accept or decline the invitation. Once you have sent the invitation, the external participant's status will change to "Invited". Please ensure that you have spoken to any external participants in advance and that they are expecting an email invitation.

For some schemes, you will have the option to invite multiple co-applicants to contribute to your application if you wish. In these cases, once the first co-applicant has been invited the option to invite another will become available.

If you want to send an external participant a reminder invitation, click the **Remind** button. If, instead, you wish to revoke their invitation (e.g. if you want to invite somebody else to the role), click the **Revoke** button.

If an external participant declines an invitation, then they will appear in the **Participants** tab with the status "Declined" and you will need to invite somebody else to the role if it is "Required".

When an external participant accepts an invitation, their status will change to "Active".

When an external participant has finished their contribution, their status will change to "Complete". If you require an external participant to amend their contribution after it has been completed (e.g. you realise they have made a mistake which needs to be rectified), click the **Reopen** button.

The external participant's status will return to "Active" and they can then amend and re-submit their contribution.

It is important to note that, in order for you to submit your application, any invited external participants must have completed their contribution before the deadline. Further information on contributing to an application as an external participant is provided in the "Contributing to an application as an external participant" section of this document.

Completing your budget table

Most applications require the completion of a budget table, detailing the costs requested from the Trust. Typically, this can be completed by the lead applicant and/or a member of staff from the lead organisation's finance department. Before completing your budget, please refer to the "What costs will you cover?" question in our funding FAQs, and also to any specific information on eligible costs provided in the call guidance documentation for the scheme you are applying to.

The exact structure of the empty budget table will differ between schemes, but it should look similar to the image below.

Typically (as in the example above), we will ask you to phase your budget on a 3 monthly (quarterly) basis. This is because if your application is successful, you will be required to claim your award on a quarterly basis against actual expenditure. Don't worry though, if your actual expenditure works out differently to your best estimate in the application, we will still pay you – but setting out the phasing in this way helps both parties for planning purposes.

The **Expand** button at the top right of the table allows you to enlarge the table.

You will first need to set the correct number of Quarters and Years to match the length of your proposed project (in the case above, only two Quarters – i.e. 6 months – are currently set). To do this click **Add another period** until the correct number of periods are shown.

To add an item to the budget, click the **Add A New Item** button at the bottom left of the table. You'll be asked to provide a name for the item, and also to select which Item Type it belongs to from a drop-down list. Selecting the **Add Total Values** box allows you to enter in a total value for the item, which is then split equally across each Quarter in your budget (e.g. for items of expenditure that you expect to remain constant for the duration of your project).

Once you have clicked **Add** the item will then appear in your budget.

You can then enter in the costs for the item for each Quarter of your budget. To remove an item from your budget, click the 🗑 symbol next to it. To edit an item in your budget, click the ✏ symbol next to it.

Submitting your application

Once you have completed all sections of the application, a **Submit application** button will become available at the top and bottom of the application summary page.

Common reasons for the **Submit application** button not appearing include:

- Not all sections of the application form are "Complete" (make sure that all mandatory questions have been answered).

- There is a "Required" external participant who has not yet been invited to contribute to the application (see the "Inviting external participants to contribute to an application" section for more details).
- One or more of your invited external participants has not yet finished their contribution (i.e. their status is marked as either "Invited" or "Active"). If this external participant is still required, see the "Contributing to an application as an external participant" section of this document for details on how they can finish their contribution. **Or**, if this external participant is no longer required, see the "Inviting external participants to contribute to an application" section of this document for details on how to **Revoke** their invitation.

Before submitting your application, we recommend downloading a PDF copy of it (see the "Downloading a PDF copy of your application" section of this document for more details) as you will not be able to do this once it has been submitted.

Once you have clicked **Submit application** a pop-up will appear asking you to confirm the submission of your application. Upon submitting your application, you will be shown a confirmation message and should also receive an automatic confirmation email.

Once you have submitted your application, it will still be available to view in the **My applications** tab of your account but you will no longer be able to edit it.

Contributing to an application as an external participant

If you are invited to contribute to an application, you will receive an automated email containing a personalised message from the lead applicant (if provided) and a hyperlink to either accept or decline the invitation. If the lead applicant has told you to expect this email, but you don't believe you've received it, it may be worth checking your spam/junk inbox. By clicking on the link, you'll be directed to the Grants Management Portal and asked to either accept or decline the invitation.

Upon accepting the request, you'll be asked to first read and agree to our Privacy Notice. If you don't already have an account on the system, you'll then be asked to register for one (please see the "Registering for an account and navigating the system" section of this document for more details).

Having agreed to our Privacy Notice and, if necessary, registered for an account on the system, you will be directed to the application summary page. At the top of the summary page you'll find some useful instructions relating to your contribution, so **please read these prior to starting any sections of the form**.

Below this, you'll find a list of any sections of the application form to which you have access. Sections for which you have read-only access will have greyed-out text and a **View** button next to them. Sections which you have permission to edit/complete will be highlighted and have an **Edit** button next to them. At the bottom of the page is a **Finish contribution** button – this will be initially greyed-out, to indicate that your contribution is yet to be completed.

Number	Page	Est. time to complete	Status	Required documents	
1	Eligibility confirmation		Complete		View
2	The research proposal		In Progress		Edit
3	About you (the Principal Investigator/lead applicant) and the proposed team, including co-applicants from community organisations (if any)		In Progress		Edit
4	The partnership with the community organisation(s)		In Progress		Edit
5	Approach to capacity building, career development and support		In Progress		Edit
6	Approach to PPI, EDI and impact		In Progress		Edit
7	Financial support requested		In Progress		View

Finish contribution

The exact details of what needs to be done in order for you to complete your contribution will differ between schemes and be dependent on your role – the instructions at the top of the application

summary page should help to explain this. However, some guidance on different roles is provided below.

Administrative/Finance Managers: For research grants (and normally only at the Full application stage), Administrative/Finance Managers are typically required to review the information entered in the application and then complete a declaration (typically a standalone section of the form) on behalf of the lead institution/organisation. They may also have permission to access and edit the financial details included in the application, if required.

Co-applicants: For some schemes, co-applicants may be given access to the entire application so that they can review the information entered and/or edit any questions related to them. For other schemes, co-applicants may just be required to review and edit a specific section of the form (for example, relating to their experience and background).

Finance Officers: Finance Officers are typically required to review and edit the financial details included in the application. **If you have been invited to contribute to an application as a Finance Officer, you may find it helpful to refer to the "Completing your budget table" section of this document.**

Heads of Department: For research grants (and normally only at the Full application stage), Heads of Department are typically required to review the information entered in the application and then complete a declaration (typically a standalone section of the form) on behalf of the department hosting the research.

Please note that the **Finish contribution** button will only become available once all sections of the form for which you have permission to edit are "Complete" – for example, in the picture above, the **Finish contribution** button would only become available once sections 2 to 6 of the form are complete (i.e. all mandatory questions have been answered). For this reason, it is important to communicate with the lead applicant and ensure that these sections are completed in enough time for you to finish your contribution before the deadline. **Please note:** even if all sections of the form to which you have access are marked as "Complete", you may still need to actively enter into a section (by pressing **Edit** next to it) in order for the **Finish contribution** button to appear.

Once you have clicked **Finish contribution** a pop-up will appear asking you to confirm completion of your contribution.
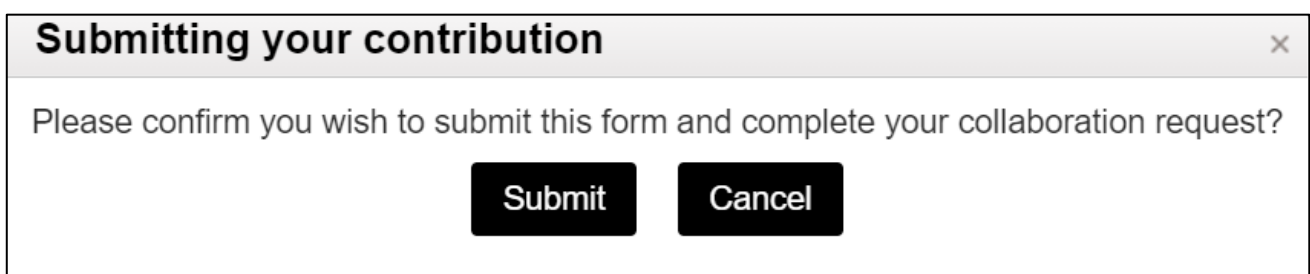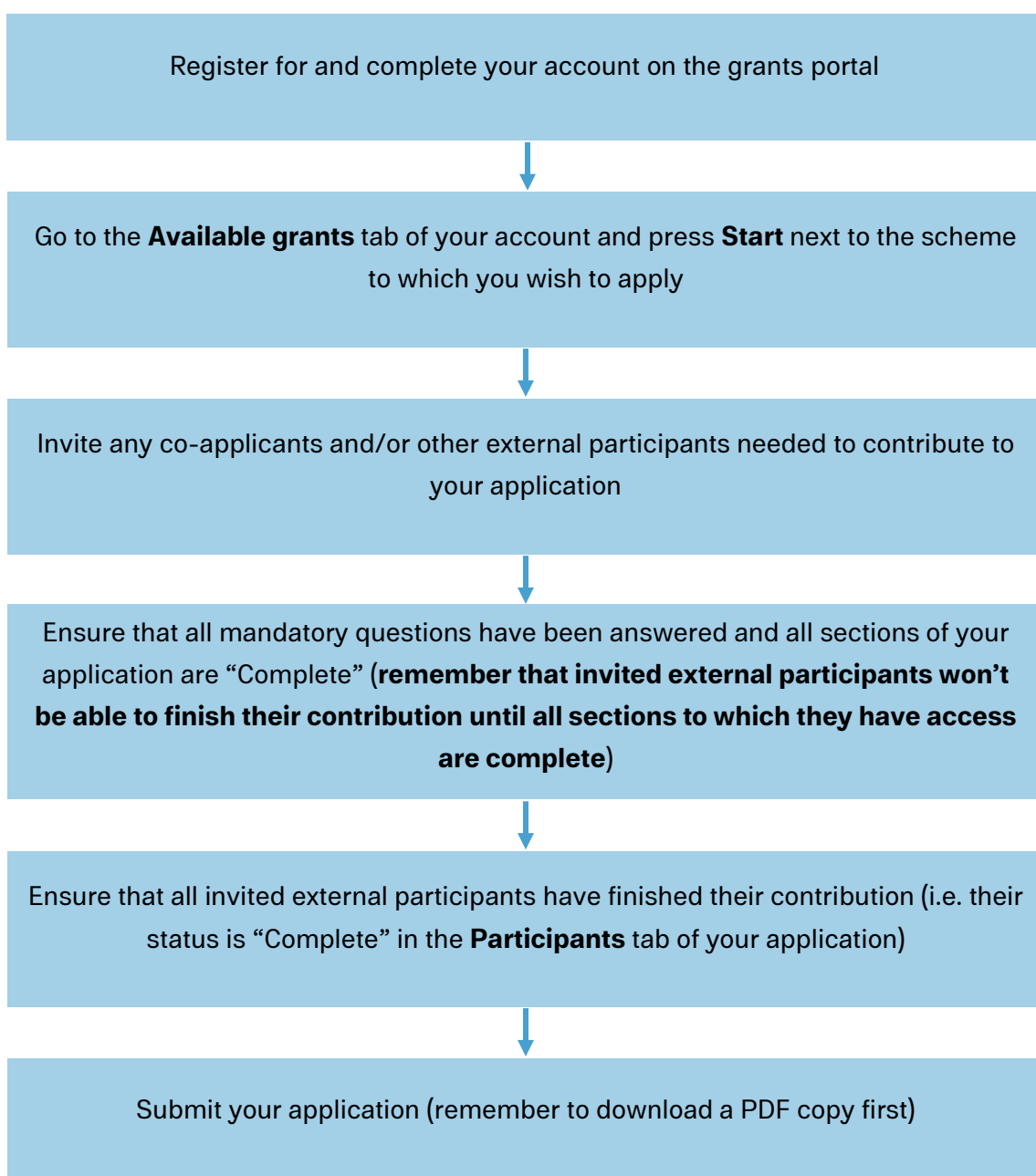
Don't worry, even though the pop-up asks you to "submit this form", clicking **Submit** will not submit the entire application – only your contribution to it.

Once you have submitted your application you will still be able to view any sections of the application form to which you had access, but you will not be able to edit them. If you subsequently wish to amend the information you have entered (e.g. you realise you have made a mistake), you will need to ask the lead applicant to **Reopen** your contribution.

Completing your application: a step-by-step flowchart

The flowchart below provides a simple overview of the steps required to complete and submit an application on the grants portal.

Register for and complete your account on the grants portal

Go to the **Available grants** tab of your account and press **Start** next to the scheme to which you wish to apply

Invite any co-applicants and/or other external participants needed to contribute to your application

Ensure that all mandatory questions have been answered and all sections of your application are "Complete" (**remember that invited external participants won't be able to finish their contribution until all sections to which they have access are complete**)

Ensure that all invited external participants have finished their contribution (i.e. their status is "Complete" in the **Participants** tab of your application)

Submit your application (remember to download a PDF copy first)

Further queries

If you have a question relating to the grants portal and cannot find the answer to it in this document, please email **admin@dunhillmedical.org.uk** and a member of our Grants Team will be able to assist you.