Research Grants Management System (RGMS)
User Guide – Applying for Grants
Target Audience – Research Community
Version: 1.9 – 25 February 2015
**VERSION CONTROL**

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**DOCUMENT CONTROL**

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**CONTINUOUS IMPROVEMENT**

NHMRC endeavours to provide the best training to the Australian medical and health research community through a continuous improvement practice. Your feedback and recommendations will be used to review and update the training materials in the future. Any feedback can be sent to the RGMS training team at rgmstraining@nhmrc.gov.au.
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1. Introduction

This is the second in a series of RGMS user guides for members of the research community. The focus of this guide is the application phase of the NHRMC grant lifecycle.

NHMRC is acutely aware that your responsibility is to undertake research that improves the way of life for all Australians. As a result we have created these guides to support you during the grant application and administration process. Our intention is to provide this guidance in a clear, concise and logical structure, so you can efficiently submit information in RGMS while continuing your primary focus, your research.

Topics covered in this guide include:

- how to create, modify and certify an application;
- management of your research team in RGMS; and
- RAO endorsement and submission to NHMRC.

IMPORTANT NOTE

This document should be read in conjunction with the funding rules and advice and instructions document, specific to the scheme for which you are applying. It is expected that anyone referring to this guide is familiar with the content in the RGMS User Guide – Introduction to RGMS (Research Community).

1.1. Target Audience

The information in this guide is aimed primarily at applicants (chief investigators) unless specifically stated otherwise. However, certain sections of this guide are also relevant to research administration officers (RAOs) and referees.

NOTE FOR RAOs only

When sections of this guide are relevant to Research Administration Officers (RAOs) only, the topic is highlighted with an orange note appended at the beginning of the section.

1.2. What is the Research Grants Management System?

RGMS is a program and portfolio management (PPM) system that enables you to apply for, track and administer NHMRC grants online, as well as participate in peer review.

Researchers can also maintain a profile and curriculum vitae, which is used for application and other administrative purposes.
1.3. NHMRC Grants Lifecycle

The NHMRC grant lifecycle consists of four broad phases (see Figure 1).

![Figure 1 – NHMRC Grants Lifecycle](image)

**IMPORTANT NOTE**

While this diagram summarises the typical steps in the process, the unique requirements of each NHMRC funding scheme may introduce additional or fewer steps. Always refer to the scheme-specific funding rules for further information and clarification.

1.4. RGMS Roles

Members of the research community play a number of different roles in the granting cycle. Typical roles are illustrated below.

![Figure 2 – RGMS Roles by Phase](image)
1.5. **RGMS Training Program**

Training is structured around the four phases of the NHMRC grant lifecycle (see Figure 1). The training program illustrated in the Figure 2 aims to provide the skills and knowledge needed to perform common tasks.

Target audiences for the program include:

- Applicants
- Assigners
- Assessors
- Grantees
- Research Administration Officers
- Finance Officers

All training material can be accessed from the [RGMS Training Program](#) web page.

---

**Figure 3 – RGMS Training Program for the Research Community**

1.5.1. **User Guides**

User guides are available as a written source of information about RGMS functionality. They provide a detailed reference to RGMS information and processes.

1.5.2. **eLearning**

eLearning modules are a practical way to become familiar with RGMS functionality. They contain interactive simulations that cover the key steps needed to complete common tasks.
2. Preparing and Modifying an Application

This section covers how to create, view and edit a grant application, along with how to confirm the status and eligibility of an application.

This topic is structured as follows:

2.1 Creating an Application
2.2 Accessing an Application
2.3 Confirming Application Eligibility
2.4 Changing the Administering Institution
2.5 Checking an Application’s Status

2.1. Creating an Application

Applications for NHMRC funding schemes must be created in RGMS. The initial application created is the same for every scheme. You will need to supply an Application Title and identify which funding scheme you are applying for.

**IMPORTANT NOTE**

If this is your first time creating an application in RGMS, you must first obtain an RGMS login account by submitting a new user request. For instructions, refer to section 2.3 Setting up an account in the [RGMS User Guide – Introduction to RGMS (Research Community)](http://www.nhmrc.gov.au/_files_nhmrc/rgms_charcount/rgms_char_count.html#).

To create an application, follow the steps below.

**IMPORTANT NOTE**

Save your work often. RGMS will ‘time out’ after 30 minutes of inactivity and DOES NOT recognise typing as an activity. A time out will cause you to lose any unsaved data.

Avoid a time out by completing a draft of your work using the offline PDF application forms available from the [NHMRC website](http://www.nhmrc.gov.au/files_nhmrc/rgms_charcount/rgms_char_count.html#), from which you can copy and paste into the RGMS application fields.

*Please note that the character count used within RGMS differs from that used by Word and Adobe.*

*To check that your data fits within the RGMS character limit restrictions please use the following resource;*

1. From the RGMS Home page, select the Applicants tab.

![Figure 4 – Accessing the Applicants Page](image)

2. Under Applying for grants, select Create new application.

![Figure 5 – Accessing the Create New Application Page](image)

**MANDATORY FIELDS**

You will notice that there are mandatory fields marked with a red asterisk 🔄. In order to continue through these sections you will need to complete all mandatory fields.

**ENTER ONCE FIELDS**

Some of the fields in your application are marked with a green arrow 🔷. When this information is submitted to NHMRC you are no longer able to edit the information.

3. Complete all mandatory fields on the page.

**TIP**

When creating an application, an RGMS Application ID is auto-generated. It is recommended that you make note of this ID number, as you may need it for future reference and/or searching.
4. Select Yes or No from the RAO Edit Access drop down menu to indicate whether you want your RAO to be able to edit your application. This nomination can subsequently be changed if you change your mind.

5. Select Yes from the Core Profile Data Entered? drop down menu to certify that your RGMS profile and CV is complete. If your Profile is incomplete, Yes will not appear as an option in the menu.

**IMPORTANT NOTE**

It is important to update relevant parts of your Profile and CV before submitting your application, as these are used in the assessment process.

6. Select Save to save your data and continue to the Properties > General page of the application. If you select Save and Return, you will be directed to the Application List page. To return to the application you will need to follow the directions from section 2.2 Accessing an Application and continue these steps.

7. Complete all mandatory fields, and then select Save to save your data and continue the application.

8. To continue entering application data, select the Properties drop down menu to view all subpages that need to be completed for your funding scheme.
**Figure 8 – Accessing the Application Properties Drop Down Menu**

**IMPORTANT NOTE**

The subpages that appear in the **Properties** drop down menu differ depending on the scheme that is being applied for.

For more information on how to complete each subpage, refer to the scheme specific advice and instructions available on the NHMRC website.

9. Navigate through each of the subpages listed in the **Properties** drop down menu, complete all fields and select **Save** as you complete each page.

**IMPORTANT NOTE**

If you go into subpages of subpages, you may need to click **Save and Return** to navigate back to a higher level page to allow you to see all Part A and Part B subpage listing under **Properties**.

It is important that you **Save** your work regularly, and before moving between pages, to avoid losing any changes. RGMS automatically logs users out after 30 minutes of inactivity; any unsaved work will be lost.

If you experience any issues with deleting or uploading your grant proposal or any part of your application, please contact the **Research Help Centre (RHC)**.
2.2. Accessing an Application

Now that you have created an application, you may need to find it to continue modifying the detail in your application.

To find your application in RGMS, follow the steps below.

1. From the **RGMS Home page** select the **Applicants** tab.

2. Under **Applying for grants**, select **Continue/view an existing application**.

![Figure 9 – Accessing an Existing Application](image)

3. You can control which applications are displayed on the **Applications List** page by using the filters at the top of the page. Select **Filter** to display the list of applications below.

For further information on how to apply, clear, save and manage filters refer to section 3.5 Filtering in the **RGMS User Guide – Introduction to RGMS (Research Community)**.

![Figure 10 – Application List Filters](image)

4. To open an application, select any of the hyperlinked fields.

![Figure 11 – Application List Example](image)
2.3. Confirming Application Eligibility

As you enter your application data, you may want to check if the application has been completed.

**IMPORTANT NOTE**

The *Eligibility Checklist* tab can be used as a guide to help you confirm if the range of information required has been entered against an application. It does not assess the content in any way; it provides a confirmation that the fields and supporting documents required for the scheme have been completed.

It should be noted that the *Eligibility Checklist* is intended ONLY as a guide, and does not amount to a final ruling.

Formal eligibility rulings by NHMRC are made in accordance with each funding scheme’s funding rules after applications are submitted. It is up to each applicant, in consultation with their RAO, to make a judgment about whether they meet the requirements of the relevant funding rules, and therefore whether to apply or not.

For more information, refer to the scheme specific *Funding Rules* available on the NHMRC website.

To access the *Eligibility Checklist*, follow the steps below.

1. Navigate to the relevant application in RGMS. For further information, refer to section 2.3.
2. Select the *Eligibility Checklist* Tab.

Depending on your circumstances, you may see the following indicators which are explained below.

- A green tick 🟢
- A red cross ❌
- A grey diamond 🟤

A green tick 🟢 indicates that RGMS determined eligibility requirements in RGMS have been met.

![Figure 12 – Application Eligibility Checklist - Requirements Met](image)

One or more red crosses ❌ indicate a possible conflict with eligibility requirements as set out in the relevant funding rules. The *Eligibility Description* and *Additional Information* columns will provide further details in this case.

One or more grey diamonds 🟤 indicate that more information is needed to fully determine an applicant’s eligibility against the relevant criteria.
Although you may check your eligibility at any time, it is highly recommended, that you confirm your status under the Eligibility Checklist tab early in the application process, then once again, just prior to initiating certification. For further information, refer to section 6. Certification and Submission.

2.3.1. CI Applications and Award Tab – RAOs Only

The CI Applications and Awards tab assists the RAO with determining Chief Investigator (CI) eligibility on grant applications and is divided into two subsections;

1. **Applications and Awards – By Researcher**
   
   This section allows RAOs to view a researcher’s entire RGMS application and grant history in order to assist determining CI eligibility on grant applications.

2. **CI Applications and Awards – By Application**
   
   This section allows RAOs to view the RGMS application and grant history for all CIs on a particular application in order to assist determining CI eligibility on grant applications.

Please refer Section 3.2.5 of the RGMS User Guide – Grant Administration (Research Community) for further steps.

2.4. Changing the Administering Institution

To change the administering institution on your application, follow the steps below.

3. Navigate to the relevant application. For further information, refer to section Accessing an Application.

4. From the Properties drop down menu, select Change admin institution from the list
5. From the **Administering Institution** drop down menu, select the new administering institution from the list.

6. Select **Save** to save your data and remain on the page. Alternatively, select **Save and Return** to complete the process and return you to the **Application List** page.

7. The request is processed automatically. Refresh your browser to update the Request Status from **Inactive** to **Request Complete**.
2.5. Checking an Application’s Status

To check the status of your application, follow the steps below.

1. Navigate to the relevant application. For further information, refer to section Accessing an Application.

2. The Status column on the far right hand side denotes the application’s current status.

![Figure 17 – Viewing an Applications Status](image)

2.5.1. The Application Progress Tab – RAOs Only

The Application Progress tab for RAOs, accessed via the RAO Dashboard (see Figure 20 below), summarises statistics on all applications in a particular round and allows you to narrow your search to specific data for the application. This enables you to see at a glance the number of applications for your institution, and quickly see what their current status is, and what the contact details are for the Chief Investigator A (CIA).

![Figure 18 - Accessing the RAO Dashboard](image)
The **Application Progress** page displays applications associated with a funding round and sorts the display according to the application’s progression in a particular round.

![Figure 19 – Application Progress Page](image)

You are able to use search filters to narrow the results displayed by initiative and/or round. For further information on how to apply, clear, save and manage filters refer to section 3.5 Filtering in the **RGMS User Guide – Introduction to RGMS (Research Community)**.

The **From Stage** dropdown field allows further filtering to show results reflecting a specific situation or point of progress in the funding round.

![Figure 20 – From Stage dropdown Field](image)

You are able to open an application by selecting the properties icon 📋.
2.5.2. The Application Summary Tab – RAOs Only

The Application Summary tab for RAOs, accessed via the RAO Dashboard (see Figures 21 and 22 below), summarises application details by funding initiative, including the number of applications linked to your institution, their current status, and Chief Investigator A (CIA) contact details. It also lists applications that are missing data to assist applicants with meeting minimum data requirements.

![Figure 21 – Accessing The RAO Dashboard](image1)

![Figure 22 - The Application Summary Tab](image2)

You are able to use search filters to narrow the results displayed by initiative, application status or round. For further information on how to apply, clear, save and manage filters refer to section 3.5 Filtering in the RGMS User Guide – Introduction to RGMS (Research Community).

Application Summary Filter

The list is displayed in a tiered structure including:

- Application Status
  - Open
  - Closed
- Scheme Name
- Application Progress
o Application Cancelled
o Withdrawn
o Under Review
o Un-submitted
o Review Finalised
o Ineligible or Non-Compliant

- Application Name

If you apply the Show All filter the top level of categories will be shown. Data is displayed as a summary count of all applications from your institution grouped by status, open or closed.

You can access subcategories by selecting the plus symbol to expand the selection. You can close the selection at any time by selecting the minus symbol.

The Count column lists the number of applications in that category as you drill down. As you expand the subcategories those totals are broken down further.

Figure 23 – Application Summary Top Level Categories

When you access the applications you will be able to see additional information displayed on the right of the screen. This information includes:

- Application number and title.
- A Properties Icon – Opens the application details in a new browser tab.
- A Grid Icon – Opens the application’s budget summary in a new browser tab.
- Budget Value – Displays the budgeted total of that grant.
- Application CIA’s name.
- Preferred Email – To create an email addressed from you to the CIA’s preferred email address.
- Preferred Phone Number – The CIA’s preferred phone number.
- RAO Edit Rights – Indicates if the RAO has edit access on an application.

Figure 24 – Viewing an Application Summary
Minimum Data Filter

The Applications Violating Minimum Data Requirements filter on the Application Summary Tab can be used to identify applications for open rounds that are missing minimum data. Minimum data requirements and deadlines are specified in the relevant scheme-specific funding rules, where applicable.

Search results are available/updated: (i) 72, 48 and 24 hours prior to the minimum data deadline, and (ii) following the deadline. Results are based on empty data fields and do not identify where placeholder text may have been used.

IMPORTANT NOTES:

- RAOs and CIAs should check separately that placeholder text (e.g. ‘text’, ‘synopsis’ or ‘xx’) has not been used in applications, as this will not be identified by this filter and will not be accepted as minimum data, consistent with the funding rules.
- RGMS scans for empty fields 72, 48 and 24 hours prior to the minimum data deadline and updates the Minimum Data portlet. Another scan is run following the deadline. Accordingly:
  - no results will be displayed before the first scan.
  - applications created or changes made to existing applications between these scans will not be reflected in searches run in the interim.
- A system-generated email reminder is sent to RAOs and CIAs 72 hours prior to minimum data deadlines where required fields are empty. RAOs and CIAs are also notified, following the deadline, if minimum data requirements were not met.
- Minimum data requirements may vary between schemes and rounds. It is important to check requirements and deadlines in the relevant scheme-specific funding rules.

Figure 25 - Applications Violating Minimum Data Requirements

2.6. Deleting an Application

There may be the need to delete an application. For example, a duplicate application is created and needs to be deleted.
IMPORTANT NOTE

Before you attempt to delete an application you need to ensure that the mandatory fields are completed. These fields can be completed with dummy data. When all mandatory fields have been entered you are able to complete the steps below.

To delete an application, follow the steps below.

1. Navigate to the relevant application in RGMS. For further information, refer to section 2.2 above.

2. Under the General section on this page, select Yes from the Mark for deletion drop down menu.

   ![Mark for deletion](image)

   **Figure 26 – Mark for deletion**

3. Select Save to save your data and remain on the page. Alternatively, select Save and Return to complete the process and return you to the Applications List page.

IMPORTANT NOTE

Selecting Yes and selecting the Save button will authorise NHMRC to delete this application.
3. Team Management

Some NHMRC funding scheme applications may require listing and managing your research team in RGMS. It is important that this information is completed and kept up to date as this information will be referred to during the assessment of your application.

**IMPORTANT NOTE**

For more information on team member requirements, refer to the [scheme specific advice and instructions](#) available on the NHMRC website.

This topic is structured as follows:

3.1 Accessing Team Details
3.2 Team Member Types
3.3 Adding a New Team Member
3.4 Adding the Proposed Salary for Team Members
3.5 Changing Chief Investigator Roles
3.6 Deleting a Team Member from the Application

3.1. Accessing Team Details

To access the team details against your application, follow the steps below.

1. Navigate to the relevant application in RGMS. For further information, refer to section 2.2 Accessing an Application

2. From the **Properties** drop down menu, select **A-RT: Research Team and Commitment**.

![Figure 27 – Accessing the Research Team and Commitment Page](image)
3.2. Team Member Types

You are able to add four types of team members to an application:

- Chief Investigator
- Associate Investigator
- Professional Research Person
- Technical Support Staff

3.2.1. Chief Investigator

Chief Investigators (CIs) are the key team members/researchers.

Depending on funding scheme requirements, you may add up to 10 CIs to an RGMS application. Your funding scheme may also allow for CIs to request a salary; however, the level and proportion requested must be fully justified.

The Chief Investigator A (CIA) is the project leader responsible for the completion and lodgement of the application. They are also responsible for the successful completion of the research proposal.

Other CIs are to read the application and must agree to its contents before it is submitted.

**IMPORTANT NOTE**

All CIs are required to have an RGMS account, otherwise, they cannot be selected when creating an application and adding team members. All CIs must also have all mandatory fields of their Profile and CV completed, in order to be added and have access to the application.

If you are trying to add a team member and you cannot find their details in RGMS, it is likely that they have not yet created an account.

3.2.2. Associate Investigator

An Associate Investigator (AI) is someone who provides intellectual input into the research and whose participation warrants inclusion of their name on publications.

AIs are *not* able to draw a salary.

The CIA must obtain written agreement from AIs to be named on the application.

RAOs are responsible for ensuring written agreement has been received from the AIs prior to certifying the application, which is to be made available to NHMRC on request.

AIs do not have access to the application in RGMS and are not required to endorse the final application.
3.2.3. Professional Research Person

A Professional Research Person (PRP) is a graduate with recognised qualifications who will be employed to undertake research on this proposal. A PRP may request a salary; however the level and proportion requested must be fully justified.

The PRP will not have responsibility for the proposal.

In RGMS, you are not required to include the name of the person, only a brief description of their role/title.

3.2.4. Technical Support Staff

Technical Support Staff includes research students and technical staff to be employed on this proposal.

You must provide details of their contribution to the proposal, including the work to be undertaken and the time commitment, and reasons for the PSP requested.

Casual staff that are to be contracted at hourly rates should NOT be included as part of the proposed salary but rather should be included under Direct Research Costs.

Do not include graduate personnel as Technical Support Staff.

In RGMS, you are not required to include the name of the person, only a brief description of their role/title.

3.3. Adding a New Team Member

To add team members to your application, follow the steps below.

1. Navigate to the Research Team and Commitment page for the relevant application in RGMS. For further refer to section 3.1 Accessing Team Details.

2. Select **New**.

3. Select the relevant team member type from the **Type** drop down menu.

![Type Drop Down Menu](image-url)
4. In the **Position Title** field, enter the position of role. This is a maximum of 100 characters.

   This field may be used for identifying a specific Professional Research Person or Technical Support Staff role e.g. Registered Nurse or Animal Handler. This field does not need to be completed for Chief Investigators and is optional for Associate Investigators.

5. Select **Save** to continue and activate the team member **Properties** page.

6. Complete all mandatory fields on the **Properties** page.

**IMPORTANT NOTE**

The fields on the Properties page differ depending on the team member type. To complete the fields, follow the guidance available on the Properties page or refer to the **scheme specific advice and instructions** available on the NHMRC website.

---

**Figure 29 – Chief Investigator Properties Page**
7. Select **Save** to save your data and remain on the page.

### 3.4. Adding the Proposed Salary for Team Members

**IMPORTANT NOTE**

This is only relevant to Chief Investigators, Professional Research Persons and Technical Support Staff. Associate Investigators are not able to draw a salary. For more information refer to section 3.2 Team Member Types.

1. Navigate to the Research Team and Commitment page for the relevant application in RGMS. For further information refer to section 3.1 Accessing Team Details.

2. Select the relevant team member by selecting the **Properties icon** or the hyperlink under the **Type** column.

3. From the **Properties** drop down menu, select **A-RT: Proposed Salary**.

---

**Figure 30 – Associate Investigator Properties**

**Figure 31 – Proposed Salary**
4. Enter the relevant Proposed Salary details for the team member.

**Figure 32 – The Proposed Salary Page**

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**HELP**

**Level**
For more information related to Personal Support Package levels, refer to the Budget Mechanisms for NHMRC Research Funding section on the [Applying for Funding](#) web page.

**Year**
Nominate the requested percentage (%) required for each year of funding.

**Reason**
Make sure that a reason is supplied to justify the level and proportion that is being requested.

5. Select **Save** to save your data and remain on the page. Alternatively, select **Save and Return** to complete the process and return you to the Research Team and Commitment page.
3.5. Changing Chief Investigator Roles

You may need to change the roles assigned to Chief Investigators.

3.5.1. Swapping Two Existing Chief Investigator Roles

Example: If the CIA role needs to be undertaken by another Chief Investigator that is already listed in RGMS, they need to be swapped.

To swap two existing Chief Investigator roles, follow the steps below.

1. Navigate to the relevant application’s team details. For further information, refer to section 3.1 Accessing Team Details.

2. Select the relevant Chief Investigator by selecting the Properties icon or the hyperlink under the Type column.

3. From the Properties menu, select A-RT: Swap CI.

4. Use the New Role drop down to select the CI that you wish to swap with.

5. Select Save to save your data and remain on the page. Alternatively, select Save and Return to complete the process and return you to the Research Team and Commitment page.

**IMPORTANT NOTE**

If the CIA is swapped, a system-generated email is sent to the new CIA advising them of the change. The application name and editing rights are also updated.
3.5.2. Assigning an Existing Chief Investigator to a New (Unassigned) Role

To assigning an existing Chief Investigator to a new (unassigned) role, follow the steps below.

1. Navigate to the relevant application's team details; for further information refer to section 3.1 Accessing Team Details.

2. Select the relevant Chief Investigator by selecting the Properties icon or the hyperlink under the Type column.

3. Use the Role drop down menu to allocate a new assignment to the team member.

![Figure 35 – Role Drop Down Menu]

4. Select Save to save your data and remain on the page. Alternatively, select Save and Return to complete the process and return you to the Research Team and Commitment page.

3.6. Deleting a Team Member from the Application

In order to remove any type of team member from an application, you first need to cancel their nomination against the application, then delete the team member.

To cancel a nomination, follow the steps below.

1. Navigate to the relevant application's team details. For further information, refer to section 3.1 Accessing Team Details.

2. Select the relevant team member by selecting the Properties icon or the hyperlink under the Type column.

3. From the Properties menu, select A-RT: Cancel Nomination.
4. Select Yes from the Cancel Nomination drop down menu.

5. Select Save to save your data and remain on the page. Alternatively, select Save and Return to complete the process and return you to the Research Team and Commitment page.

**IMPORTANT NOTE**

It is recommended that at this stage you do not hit Save multiple times, as this can cause the process to malfunction. Just hit Save or Save and Return once.

After a short delay, the nomination status will change to Nomination Cancelled. You may have to refresh your browser (press the F5 key) to view the change.

6. Select the appropriate team member, by selecting the check box in the left hand column.

7. Select Delete.

8. Select Delete to confirm.
Figure 38 – Delete Confirmation

The team member will be removed from the list of team members against this application.

IMPORTANT NOTE

If the team member cancelled is a CI, this will also trigger a system email to the CI to notify them that their nomination has been cancelled.
4. Reviewing and Exporting Application Data

In RGMS, the Snapshot Reports function allows you to export your application data to a series of documents for review and archiving purposes.

IMPORTANT NOTE

Only the Chief Investigator A (CIA) can request a snapshot report.

To request a snapshot report, follow the steps below.

1. Navigate to the relevant application. For further information, refer to section 2.2 Accessing an Application.

2. From the Properties drop down menu, select Request latest snapshot.

3. Select Yes from the Request Snapshot? drop down menu.

4. Select Save to save your data and remain on the page. Alternatively, select Save and Return to complete the process and return you to the Application List page.
IMPORTANT NOTE

You may have to wait a few minutes for the system to process the request and run the snapshot reports. Do not attempt to run the process twice in short succession.

This process puts extra load onto the system, so snapshots should be run sparingly and only when necessary.

5. Select the **Snapshot Reports** tab.

6. The snapshot reports and any associated attachment(s) previously uploaded will be provided in a list, along with a timestamp of when the snapshot was run.

   ![Figure 41 – Snapshot Reports Tab](image)

7. To open the required snapshot, select the hyperlink in the **Attachment** column.

8. You will be prompted if you want to Open, Save or Save As. You can print a copy of your report from any of these options.
5. Referee Reports

IMPORTANT NOTE FOR APPLICANTS

Only Postgraduate Fellowships and Early Career Fellowships require referee reports. If you are an applicant, refer to your scheme specific advice and instructions for more information on how to nominate someone to be your referee.

- Postgraduate Scholarships Advice and Instructions
- Early Career Fellowship Advice and Instructions

In RGMS, the Eligibility Checklist tab will also alert you if your application requires any referee reports. For further information, see section 2.3 Confirming Application Eligibility.

If the nominated referee has an RGMS account, they can submit the referee report directly into the system.

If you have been nominated to submit a referee report, the steps to submit a referee report are outlined below.

1. From the RGMS Home page select the Referees tab.
2. Select the Upload referee report quick link.

   ![Figure 42 – Uploading a Referee Report](image)

3. Select the relevant initiative from the Initiative drop down menu.
4. Select the relevant round from the Round drop down menu.

5. Select the Application field and enter the Application ID. Alternatively, use the Application lookup icon 🏛️ to find and add the Application ID.

6. To add the document containing the referees comments, select Browse 🗂️.

7. Navigate to the relevant file and select Open 📂️.

8. Select Save to save your data and remain on the page. Alternatively, select Save and Return ☑️ to complete the process and return you to the Referee Comments List page.
6. Certification and Submission

When an application has all required application and team data entered, the last step is to certify and submit the application.

This topic will cover how both Chief Investigator A (CIA) and a Research Administration Officer (RAO) certify and submit an application into RGMS.

This topic is structured as follows:

- 6.1 CIA Certification Commencement
- 6.2 RAO Endorsement and Certification

6.1. CIA Certification Commencement

Certification should only be commenced when the application is

- Complete,
- Proof-read by other research team members, and
- ready to send to your RAO for certification.

As the CIA, you will also need to certify your application after commencing this process.

It is recommended that the CIA alert the RAO before certifying, as it is much easier for the CIA to implement edits from the RAO prior to certification. Errors discovered after certification require the RAO to reject the application in RGMS. Only then can the CIA make additional edits and re-certify the application for submission.

IMPORTANT NOTE

COMMENCING THIS CERTIFICATION WILL LOCK DOWN THIS APPLICATION AND PREVENT FURTHER EDITING.

The Eligibility Checklist tab can be used to indicate if the range of information required has been entered against an application in RGMS. For further information, see section 2.3 Confirming Application Eligibility.

To certify your application and submit it to your RAO for endorsement, follow the steps below.

9. Navigate to the relevant application. For further information, refer to section 2.2 Accessing an Application

10. Select the Certification tab.

11. From the Certification drop down menu, select CI Certification.
12. Select Yes, Request CI Certification from the Do you wish to commence certification? drop down list.

13. Select Save to save your data and remain on the page. Alternatively, select Save and Return to complete the process and return you to the Application List page.

The application is now submitted to your RAO for endorsement.
IMPORTANT NOTE

If certification of the application is rejected or cancelled by the RAO at any time, you will need to re-certify the application before it can be submitted. If re-certification is required, you will receive notification via email.

6.2. RAO Endorsement and Certification

NOTE FOR RAOs only

This information is relevant to Research Administration Officers (RAO’s) only.

Once the CIA has started the certification process and has certified the application, it will be available for RAOs to both endorse and certify. RAOs can use the **RAO Dashboard** to track the progress and access the applications awaiting endorsement and certification.

For more information on the **RAO Dashboard**, refer to the **RGMS User Guide – Grant Administration (Research Community) Section 3: RAO Dashboard**.

6.2.1. Accessing the Application for Endorsement and Certification

To access the application for endorsement and certification, follow the steps below.

1. From the **RGMS Home page**, select the **RAO/Finance Officers** tab.
2. Under the **Quicklinks for RAOs**, select **View My RAO Dashboard**.
3. Select the Application Progress tab.

4. Use the filters to display the applications you have access to. For further information refer to the RGMS User Guide – Introduction to RGMS (Research Community) section 3.5 Filtering.

5. To open the relevant application, select the hyperlink in the Application column.

Any applications that require RAO Endorsement will be highlighted with an Important icon and the Submitted to RAO (Open) column ticked.

6.2.2. Endorsing (or Rejecting) the Application

To endorse or reject the application, follow the steps below.

1. Navigate to the relevant application. For further information, refer to section 6.2.1 Accessing the Application for Endorsement and Certification.

2. Select the Certification tab.
3. From the **Certification** drop down menu, select **RAO Endorsement**

![Image of RAO Endorsement List](image1)

**Figure 51 – Accessing the RAO Endorsement List**

4. Select **New**.

![Image of New RAO Endorsement](image2)

**Figure 52 – New RAO Endorsement**

5. From the **Do you wish to endorse this application?** drop down menu, select your response.

![Image of RAO Endorsement Response Options](image3)

**Figure 53 – RAO Endorsement Response Options**

**IMPORTANT NOTE FOR RAOs**

Rejecting the application for a minor or major change will require the CIA to re-certify the application after revising the necessary change(s).

6. Use the **Comments / Request Changes** text field to provide a reason for endorsing or not endorsing the application.

   If the application was not endorsed, your comments will be provided to applicant who will then be able to change their application and resubmit it if appropriate.

7. Select **Save** to save your data and remain on the page. Alternatively, select **Save and Return** to complete the process and return you to the **RAO Endorsement** page.
6.2.3. RAO Certification

If the application was endorsed, you must continue on to certify the application before it is considered submitted.

To certify the application, follow the steps below.

1. Navigate to the relevant application. For further information, refer to section *6.2.1 Accessing the Application for Endorsement and Certification*.

2. Select the Certification tab.

3. From the Certification drop down menu, select RAO Endorsement.

![Figure 54 – Application Endorsed But Not Yet Certified](image)

4. To certify the relevant application, select the Application endorsed hyperlink.

5. From the Properties drop down menu, select Certification.

![Figure 55 – Accessing Certification](image)

6. Complete all mandatory fields.

7. Select Save to save your data and remain on the page. Alternatively, select Save and Return to complete the process and return you to the RAO Endorsement page.

Once the RAO certification is completed, the application will have the status of Submitted to NHMRC in the RAO Dashboard.