ASSIGNER PROCESSES

Contents

1. Introduction.............................................................................................................................................. 1
2. Assigners Academy: Assigning Applications.......................................................................................... 2
   2.1 Setting an Assigners Custom Filter .................................................................................................. 2
3. Download Application Documents ............................................................................................................ 5
4. Formatting and Creating Assigner Email Stationery .................................................................................. 8
   4.1 Resetting the Assigner Email Text ................................................................................................... 12
5. Identifying External Assessors .................................................................................................................. 12
   5.1 Application Details ............................................................................................................................... 12
   5.2 Ineligible Candidates ............................................................................................................................. 14
   5.4 Potential candidates – further information .......................................................................................... 17
6. Managing External Assessors Invitations .................................................................................................. 20
   6.1 Inviting External Assessors .................................................................................................................. 20
   6.2 Cancel Invitations ................................................................................................................................. 23
7. Assigners’ Decisions on Conflicts of Interest (CoI) for External Assessors ............................................. 26
   7.1 Assigners Ruling on an External Assessor’s CoI ................................................................................ 26
   7.2 Recording EA CoIs Declared Outside of RGMS ................................................................................. 27
8. Coordinating Review by Overseas External Assessors .............................................................................. 29
9. Monitor External Assessor (EA) Progress ................................................................................................. 30
   9.1 Monitoring Progress of Multiple Applications ................................................................................... 30
   9.2 Monitoring external assessors’ progress on individual applications .................................................... 33
   9.3 Extend the Due Date for External Assessment/s ................................................................................ 35
   9.4 Copy External Assessors to Another Application ............................................................................... 37
1. Introduction

This document should be read in conjunction with the *Guide to NHMRC Peer Review 2015* and the *Project Grants scheme-specific guidelines*. The focus of this guide is the assignment portion of the assessment phase for 2015 Project Grants.

This guide covers assigning applications to external assessors.

It is expected that anyone referring to this guide is familiar with the content in the [RGMS Users Guide – Introduction to RGMS (Research Community)](http://www.rgms.gov.au).

This guide targets NHMRC’s Assigners Academy members only.
2. Assigners Academy: Assigning Applications

IMPORTANT NOTE:
This section applies to Project Grants, Development Grants and Program Grants only.

The first step in the peer review process is the assigning of applications to external assessors. The assigning of applications is completed by members of the Assigners Academy.

This section outlines how to respond to invitations, manage external assessors and monitor the assessment progress for assigned applications.

2.1 Setting an Assigners Custom Filter

Assigners Academy members will frequently use the ‘Assigner Application List’ page to access applications assigned to them. To assist in the search through the Application List, custom filters can be prepared to remember your filtering preferences. The filter settings below are appropriate for the majority of processes in RGMS and will be referred to as the “standard filter preferences”.

1. From the RGMS Home page, select the Assigners tab.
2. Navigate to the Quicklink for Assigners section and select the Identify potential assessors quicklink.

![Figure 1 – Identify Potential Assessors Quicklink](image)

3. To select the relevant scheme/round, select the binoculars icon and using the Filter options, choose the relevant round and select Add.

![Figure 2– Identify Potential Assessors: Round Field](image)
4. Ensure the **Assigned** drop down field is set to **Yes**.

   ![](image)

   Figure 3 – Assigned Drop Down Menu

   **IMPORTANT NOTE**

   To see applications already assigned to you as Assigner, you will need change the **Assigned** dropdown field from **No** to **Yes**. This will assist you in monitoring the status of external assessments. For further information on monitoring the status of external assessment refer to section 9, Monitor External Assessor (EA) Progress.

5. Ensure the **Active Applications** dropdown field is set to **Yes**.

   ![](image)

   Figure 4 – Active Applications Drop Down Menu

6. Select **Save Filter**

7. Enter a name for this filter in the **Filter Name** field (e.g. Assigner Filter).

   ![](image)

   Figure 5- Entering a Filter Name

8. Select the **Default** check box.

9. Select **Save and Return** to save the filter and return to the **Assigner Application** list. The filter will now appear in the **Filter** drop down menu at the top left hand side of the page.

   ![](image)

   Figure 6 - The Saved Filters Drop Down Menu
3. Download Application Documents

Following CoI declarations and suitability preferences, Assigners Academy members are allocated applications. To assist with identifying the most appropriate external assessors, Assigners Academy members can now download all application documentation. The application documentation is provided in a password protected zip file which is downloaded from RGMS.

Instructions to download the application documentation for all applications assigned to you are outlined below.

**IMPORTANT**
You will require a zip file expander program, such as WinZip or Peazip (PC) or StuffIt Expander (Mac), to extract the application documents from the file.

**NB:** several steps highlighted below are almost identical to those outlined for the CoI and suitability steps.

1. From the **RGMS Home** page navigate and select the **Assigners** tab.

2. Navigate to the **Quicklinks for Assigners** section and select the **Review application documents** quicklink.

![Figure 7 – Review Application Documents Quicklink](image)

- NHMRC would like to thank all assigners, past and present, for their assistance in securing assessments. Previous Academy Members are listed on the [NHMRC website](#).
3. Select the relevant round from the **Round** drop down field.

![Figure 8 - Filtering Download Document List](image8.png)

4. From the **Document Type** drop down field, select **Application Documents – Assigner**.

![Figure 9 - Download Documents List: Selecting a Document Type](image9.png)

5. Select **Save**.
6. Navigate to the **Properties** and using the dropdown menu and select the **Documentation – Assigner** link to the download-Properties page.

![Download Documents: download – Properties page](image)

**Figure 10** – Download Documents: download – **Properties** page

7. Navigate to the **Name** field; begin typing your surname and choose the options provided by the auto lookup. Alternatively, by selecting the binoculars icon, enter your details and select **Filter**. Select your name and press **Add**.

8. Navigate to the **Download Purpose** drop down field and select the following download purpose from the list:

   **Allocate Assessors** – This selection will produce a download which excludes documents associated with applications on which you have declared a High CoI.

![Download Purpose Dropdown Field](image)

**Figure 11** – Download Purpose Dropdown Field

9. Create and enter a password in the **Password** field.

**IMPORTANT NOTE**

The password must be no more than 20 characters in length. It will be used to gain access to the downloaded zip file and will be recorded on this page for future reference.
10. Navigate to the **Generate Zip File** drop down field and select **Yes** from the list.

![Figure 12 – Generate Zip File Dropdown Field](image)

11. Select **Save** to save your data and generate the zip file.

12. A URL link should appear. If not, you may need to refresh the page for the URL to appear. When the URL is generated, select the hyperlink. You will have 48 hours to download the zip file.

   You may be prompted to save or open the zip file. Save the file to your computer; If an error message appears (e.g. Status 404 Error) or nothing happens when you select the URL, close the error message, wait five minutes, refresh the page (F5 for windows, cmd +R on a Mac) and then re-select the URL.

13. Open the zip file on your computer using a zip file expander program (such as WinZip or Peazip [PC] or Stuffit Expander [Mac]). You will be required to enter the password entered in Step 10 to open the files.

14. Extract the application documents to a folder on your computer. This will save having to enter the password each time the documents are opened.

   The extracted files will include a csv file entitled “AAA_<Assigner Name>” which lists the CIA name and application ID of all the application documents that have been downloaded. Some Mac users have reported problems in opening the zip files. This occurs when Apple’s default Archive Utility program is used to open the zip file. An alternative zip expander program is recommended.

4. **Formatting and Creating Assigner Email Stationery**

Assigners Academy members approach external assessors to review applications by sending invitation emails from RGMS. Templates for invitation and cancellation emails are generated in RGMS and may be customised by Assigners Academy members as soon as a list of allocated applications is received. Instructions on preparing the emails are outlined below.

1. From the **RGMS Home** page select the **Assigners** tab.
2. Navigate to the **Quicklinks for Assigners** section and select the **Configure assessor invitation emails** quicklink.

![Figure 13 – Accessing the Assigners Page and Configure Assessor Invitation Emails Quicklink](image)

3. Select one of the hyperlinks against your details or select the **properties** icon.

4. Navigate to the **Properties** tab dropdown menu and select the **Assigner** link from the menu.

![Figure 14 – Accessing the Profile and CV: Properties Assigner Configure Assessor Page](image)
The screen below should appear

![Profile and CV: Properties Assigner Page](image)

**Figure 15 – Profile and CV: Properties Assigner Page**

5. In the **Email Address** field, enter your preferred email address to be used for assigner related correspondence. It is important that you enter an email address because some institutional email security filters can either AUTOMATICALLY DELETE or send externally sent emails to SPAM FOLDERS. To avoid this issue, RGMS allows you to define the email address from which all your correspondence will come. The invitation generated by RGMS includes a line saying RGMS is sending it on behalf of the Assigner.

![Email Address Fields](image)

**Figure 16 – Email Address Fields**

6. If you want to be copied into all email correspondence sent from RGMS, select the **CC addressee on emails you generate** check box (refer to Figure 4, above).
7. Enter your preferred email salutation in the **Sign off and signature block** field.

![Sign off and signature block field]

**Figure 17 – Sign Off and Signature Block Field**

8. Select the **Initialise email address and text** check box at the bottom of the page.

![Initialise email address and text]

**Figure 18 – Initialise Email Address and Text**

9. Select the **Initiative for sample email** and select **Save**.

10. **Refresh** your browser to update RGMS with the changes. This will generate the default template text for your invitation and cancellation emails. RGMS will also add default text to these email templates.

11. To preview an example of your emails, select the **Generate sample invitation email** check box or **Generate sample cancellation email** and select **Save**. An example of the email generated will shortly be sent to the email address entered at the top of the page. If you would like to revise your email templates return to step 2.

![Generate sample emails]

**Figure 19 – Generate Sample Invitation Email and Generate Sample Cancellation Email Check Boxes**

12. Once complete, select **Save and Return** to save your work and return to the **Profile and CV** list.
4.1 Resetting the Assigner Email Text

You may wish to reset the text of your template emails. The instructions below continue from the steps above.

1. To reset the text to the default templates uncheck the initialise email address and text check box and select Save.

2. Select the Initialise email address and text check box so that it is now checked and select

5. Identifying External Assessors

In addition to the application details already downloaded, RGMS provides search functions and additional resources to assist Assigners Academy members to identify potential external assessors. These functions and resources are especially useful when you have not yet considered any particular external assessors for your Applications.

IMPORTANT NOTE

To assist you to identify external assessors you will need to download the application documentation, if you haven’t done so already. For further information on how to download this information refer to Section 3 Download Application Documents.

Instructions on identifying appropriate external assessors for applications are outlined below.

5.1 Application Details

1. From the RGMS Home page select the Assigners tab.
2. Navigate to the **Quicklinks for Assigners** section and select the **Identify potential assessors** quicklink.

![Quicklinks for Assigners](image)

**Figure 20 – Accessing the Assigners Tab and Identify Potential Assessors Quicklink**

For information on how to create a default assigners filter refer to section

**2.1 Setting an Assigners Custom Filter.**

3. Select the relevant application by selecting the hyperlink **Application ID** column or Properties icon 📄.

4. Select the **Application** tab to view application details including the:
   - Application Documentation
   - Application Team Members
   - Nominated Possible Assessors
   - Research Keywords
5.2 Ineligible Candidates

1. Select the Ineligible Candidates tab. This displays a list of individuals who should **not** be approached to review the application.
2. Alternatively, when selecting an external assessor in the **Candidate** field, any ineligible candidates will be identified by a **DO NOT CONTACT** message next to their name.

**Figure 23 - Ineligible Candidate message**
5.3 Candidates based on keyword matches

1. Select the **Candidates Based on Keyword Matches** tab. This will provide you with a list of potential assigners that you can review for suitability.

![Candidates Based on Keyword Matches](image)

**Figure 24 – Candidates Based on Keyword Matches**

2. In the **Minimum Matches With Application** field, enter a number (1-5) to display RGMS account holders with at least the specified number of keywords in common with this application.

![Minimum Matches With Application](image)

**Figure 25 - Potential External Assessor: Displaying additional information**

**IMPORTANT NOTE:**

*In order to identify the best external assessor begin with a value of 5 in the **Minimum Matches With Application** field. If no external assessor is found, reduce the value by one and select **Filter**, until an appropriate assessor is identified.*

3. Select **Filter**.

4. Upon identifying a potential external assessor, select the plus icon next to the **Name** field to display additional information about the individual's recent research expertise.
5.4 Potential candidates – further information

1. Navigate to the Properties tab dropdown menu and select the Assignments link in the menu.

![Figure 26 - Accessing the Assignments subpage link](image)

2. Select the New button.

3. Search for your intended external assessor using the Candidate with RGMS Profile option (refer to Figure 27 section A); by typing the Surname directly into the field or by using the binocular icon to then Add an Assessor. If an Assessor cannot be found, enter their details manually using the Candidate without RGMS Profile option (refer to Figure 27 section B) by entering required fields.

![Figure 27 - Creating an Assignment: Searching for External Assessor](image)

4. Select Save and Return to save all the details and return to the Assigners Application Properties page. The potential external assessor will now appear in the Assignments table. Repeat the above process to add more potential external assessors. You can add as many as you would like to ‘preload’ your list of potential external assessors.
5. To assess whether they are a suitable review for the application, click on the **Person with List icon** next to the potential external assessor. This will open the **Assignment Portlet** (a small, self-contained window).

Use the relevant tabs to review the external assessor’s details such as **Research Alignment, Commitment and Publications**. Please pay particular attention to the **Commitments and Unavailability – This Year** tab as this will indicate whether or not the potential assessor is available to participate in peer review. **Assessors who are listed as ‘unavailable’ should not be approached.**

![Figure 28 - Assignment Portlet](image)

6. Close the **Assignment Portlets: Personal Details** page and return to the Assignments Properties page.
7. If you have not been able to select an appropriate external assessor you can select the **Keyword Search** tab. This step is not required if you have found an external assessor/s.

![Figure 29 – Accessing the Keyword Search Page](image)

This page allows you to perform keyword searches to identify potential external assessors. Detailed instructions on using this function are provided on the **Assigner Application: Keyword Search** page in RGMS.

8. Once you have identified a potential external assessor, invite them to review the application. Refer section **6.1 Inviting External Assessors** for details.
6. Managing External Assessors Invitations

When appropriate external assessors have been identified they need to be invited within RGMS. This section will outline how to:

- Invite an external assessor
- Cancel an invitation
- Accept or decline an invitation of behalf of an external assessor

6.1 Inviting External Assessors

Assigners Academy members are responsible for obtaining two external assessments for each application they are assigned. Instructions on inviting an external assessor to review an application are outlined below.

1. From the RGMS Home page select the Assigners tab.
2. Navigate to the Quicklinks for Assigners section and select the Assign applications to assessors quicklink.

![Figure 30 – Accessing the Assigners Page Accessing the Assigners Page](image)
3. You can apply the filters (e.g. Scheme or Round) to narrow the result and select Filter. Applications that you are responsible for will be automatically listed.

4. Select an application by selecting the hyperlink in the Application ID column or Properties icon.

5. Navigate to the Properties tab dropdown menu and select the Assignments link in the menu.

6. Select the hyperlink in the Last Name column of the relevant external assessor.

7. Navigate to the Properties tab dropdown menu at top of the page and select the Invitation link from the menu.

8. The default invitation text will appear in the Invitation field. If you wish you can customise the invitation email text for this specific invitation. Any changes made will apply to this invitation only.

![Figure 31 – Invitation page](image)

9. By default, invitations address potential external assessors formally using their title and last name entered in RGMS. To use an alternative name check the Candidate is a Friend? box and enter the alternative name in the Preferred Name field.

**IMPORTANT NOTE:**

When submitting their application, applicants are asked whether or not they consent to their application(s) being reviewed by an Overseas External Assessor. RGMS displays their nomination in the ‘CIA Gave Consent For An Overseas Assessor?’ field with either a green ✔ for ‘Yes’ or a red ✗ for ‘No’. If consent has not been given, Assigners must not assign the application to an Overseas External Assessor.
Select Yes from the Send Invitation Email drop down menu.

Depending on the individual’s involvement with the NHMRC assessment process for the calendar year, one of four different options will appear:

1. Yes
2. Yes (**GRP member**)
3. Yes (**>=6 assessments**)
4. Yes (**>=6 assessments and GRP member**)

With the exception of the first option, these selections indicate a potential assessor with a recent, substantial commitment to NHMRC. For example, the second option indicates that the potential EA is a GRP member for the current round. Although RGMS will not prevent you from sending an invitation displaying one of the last three instances, you may want to reconsider your choice if any but the first option appears.

10. If you are satisfied that the potential external assessor is suitable and should be approached, select Save and Return to send the invitation. RGMS then navigates back to the Assigner Application: Properties page from where you are able to invite additional external assessors for this application.
**IMPORTANT NOTE:**

If the RGMS Profile check box is checked, the external assessor has a RGMS account. If not the assessor will need to create a RGMS account before they can access the application in RGMS.

If you rule the conflict to be None or Low the assessor will gain access to the application in RGMS and receive a corresponding email advising how to create an RGMS account and access the application. The invitation email also includes instructions on creating an account and accessing the application.

---

**IMPORTANT NOTE:**

Only two invitations to external assessors can be sent at any one time. Once an external assessor accepts an invitation, you will only be able to invite additional one assessor.

---

### 6.2 Cancel Invitations

Assigners Academy members may cancel an invitation to an external assessor at any time (e.g. sent to the wrong person or you have enough candidates to proceed in the assessment process). The instructions below outline this process.

1. From the RGMS Home page select the **Assigners** tab.
2. Navigate to the **Quicklinks for Assessors** section and select the **Identify potential assessors** quicklink.

![Figure 33 - Accessing the Assigners Page and Identify Potential Assessors quicklink](image-url)
3. Ensure the standard filter preferences are selected and select Filter. For more information refer to section 2.1 Setting an Assessors Custom Filter.

4. Select the hyperlink in the Application ID column for the application for which you want to cancel the invitation.

5. Navigate to the Properties tab dropdown menu at top of the page and select the Assignments link from the menu.

6. Select the external assessor’s last name hyperlink.

7. Navigate to the Properties tab dropdown menu at top of the page and select the Invitation link from menu.

8. The default cancellation text will appear in the Cancellation field. If you wish to customise the default text for this specific cancellation, you may edit directly in the Cancellation field.

9. Select Yes from the Cancel Invitation drop down field.

10. Select Save and Return to cancel the invitation and return to the Assigner Application: Properties page.

To review cancelled invitations, ensure that ‘Inactive’ is selected from the Status Filter and refresh the page.

Using this filter allows you to view cancellation dates and total cancellations for this application as well as reducing the chance of sending an invitation to a potential External Assessor who has already declined a previous invitation.

6.3 Accept or Decline an Invitation on an External Assessor’s Behalf

On occasion, external assessors may contact an Assigners Academy member outside of RGMS to indicate their willingness to review an application. It is important that external assessors’ decisions are recorded in RGMS to either allow them access to provide assessments, or to signal that an alternative assessor is required. Instructions on recording external assessors’ decisions in RGMS are outlined below.

1. From the RGMS Home page select the Assigners tab.
2. Navigate to the **Quicklinks for Assigners** section and select the **Monitor and manage assigned applications** quicklink.

![Quicklinks for Assigners](image)

**Figure 34 – Accessing the Assigners Page and Monitor and Manage Assigned Applications quicklink**

Ensure the standard filter preferences are selected and select **Filter**. For more information refer to section **2.1 Setting an Assigners Custom Filter**.

3. Select an application by selecting the hyperlink in the **Application ID** column - you will be directed to the **Assigner Application: Properties page**.

4. Navigate to the **Properties** tab dropdown menu at top of the page and select the **Assignments** link from the menu.

5. Select the hyperlink in the **Last Name** column of the relevant external assessor.

6. Identify the corresponding response in the **Candidate's Decision** drop down field as:

   - **Accepted (Assigner)** – External assessor has accepted the invitation.
   - **Decline (Assigner)** – External assessor has declined the invitation.
   - **Decline (NHMRC – OSEA)** – External assessor is an overseas assessor and has declined the invitation.

   If the **Accepted** option is selected the external assessor will receive an automatic email from RGMS advising that they can now access the application summary in RGMS and commence their conflict of interest process.

7. Select **Save and Return** to save your edits and return to the **Assigner Application: Properties page**.
7. Assigners’ Decisions on Conflicts of Interest (CoI) for External Assessors

All external assessors approached will need to identify whether they have a CoI with an application. Managing CoIs is essential to maintaining a robust and equitable peer review process. For information on what constitutes a conflict of interest, refer to the Guideline for Managing Conflicts of Interest in NHMRC Peer Review outlined in your scheme’s peer review guidelines.

**IMPORTANT NOTE:**
Assigners Academy members who require policy advice on CoI rulings for Project Grant applications should contact the Project Grants team at academy@nhmrc.gov.au.

7.1 Assigners Ruling on an External Assessor's CoI

The invitation email sent to external assessors provides a hyperlink to an online form where they indicate their willingness to review an application. External assessors may accept the invitation but indicate that they have a potential conflict of interest. When this is the case, the Assigners Academy member will receive an email from RGMS indicating that a ruling is required.

The instructions below outline the process of ruling on a conflict of interest.

1. Click on the link provided in the email received.
2. You will be navigated to the Assessors Response URL page (not RGMS).
3. Review the details of the potential conflict of interest as found in the CoI Comments – Candidate field. Note: If there are no comments made in this field, a CoI Comments – Candidate text box will not appear.
4. Enter any comments you have into the **Col Comments - Assigner/NHMRC** field and select **Save**.

![Figure 35 - Assignment Properties – Conflict of Interest page](image)

5. Determine and select the level of conflict, using the **Col Ruling** drop down menu:

   - **None** – There is no conflict of interest and the external assessor can review the application.
   - **Low** – The conflict of interest is low and the external assessor can review the application.
   - **High** – There is a substantial conflict of interest and the external assessor will not be able to review the application.

6. Select **Save and Return** to save your entries and return to the **Assigner Application: Properties** page.

   If there are insufficient details to make a ruling, contact the external assessor.

   If the **Col Ruling Requested?** checkbox is checked, a ruling on the conflict must be made in RGMS before the **Candidate’s Decision** drop down field can be changed and the external assessor is given access to the application.

### 7.2 Recording EA CoIs Declared Outside of RGMS

When external assessors declare a conflict of interest outside RGMS (e.g. via email) it is important that this conflict of interest information is documented in RGMS.

Instructions on recording a conflict of interest are outlined below.

1. From the RGMS Home page select the **Assigners** tab.
2. Select the **Monitor and manage assigned applications** quicklink.

![Quicklinks for Assigners](image)

**Figure 36 – Accessing the Monitor and Manage Assigned Applications Quicklink**

3. Ensure the standard filter preferences are selected and select **Filter**.

   *For more information refer to section 2.1 Setting an Assigners Custom Filter.*

4. Select an application by selecting the hyperlink in the **Application ID** column, you will be directed to the **Assigner Application: Properties page**.

5. Navigate to the **Properties** dropdown menu at the top of the page and select the **Assignments** link or **Properties** box.

6. Select the hyperlink in the **Last Name** column of the relevant external assessor.

7. Navigate to the **Properties** tab dropdown menu and select the **Conflict of Interest** link from the menu.

8. Check the **Col Ruling Requested?** check box

9. Enter the conflict details into the **Col Comments - Assigner/NHMRC** field and select **Save**

10. Determine and select the level of conflict using the **Col Ruling** drop down list:

   - **None** – There is no conflict of interest and the external assessor can review the application.
   - **Low** – The conflict of interest is low and the external assessor can review the application.
- **High** – There is a substantial conflict of interest and the external assessor will not be able to review the application.

11. Select **Save**.

---

### 8. Coordinating Review by Overseas External Assessors

Assigners Academy members may contact overseas researchers to provide an external assessment for an application they are assigned. Assessments by overseas external assessors without an RGMS account will be managed differently, as outlined below.

**IMPORTANT NOTE:**

When submitting their application, applicants are asked whether or not they consent to their application(s) being reviewed by an Overseas External Assessor. RGMS displays their nomination in the ‘CIA Gave Consent For An Overseas Assessor?’ field with either a green for ‘Yes’ or a red for ‘No’. **If consent has not been given, Assigners must not assign the application to an Overseas External Assessor.**

1. Invite the overseas external assessor as outlined in **section 6.1 Inviting External Assessors**.

2. The invitation email requests that overseas external assessors contact NHMRC to indicate their willingness to review the application.

**IMPORTANT NOTE**

Where assigners receive an email from overseas external assessors indicating their willingness to assess a Project Grant application, please forward this email to the Project Grants team at projects.rulings@nhmrc.gov.au

3. This will notify NHMRC to contact the assessor to coordinate review of the application.

4. Once the assessment is complete and has been submitted in RGMS by NHMRC, the **Assignments** table for that application will be updated to reflect a completed external assessment. Refer to **Section 9 Monitor External Assessor (EA) Progress for assistance with navigating to and interpreting the Assignments table.**
9. Monitor External Assessor (EA) Progress

Assigners Academy members can track the progress of external assessments using features provided in RGMS. These features are highlighted below.

9.1 Monitoring Progress of Multiple Applications

Instructions on monitoring the progress of multiple applications sent for external assessment are outlined below.

1. From the RGMS Home page select the Assigners tab.
2. Navigate to the Quicklinks for Assigners and select the Monitor and manage assigned applications quicklink.

![Figure 37 – Accessing the Monitor and Manage Assigned Applications Quicklink](image)
3. Ensure the standard filter preferences are selected and select Filter. For more information refer to section 2.1 Setting an Assigners Custom Filter.

4. The filter options to the right of the page customise the applications displayed. Only applications which meet specific criteria are displayed. This may assist you to identify applications requiring attention.

![Assigner Application List](image)

Figure 38 – Assigner Filter Options

The adjustable criteria are identified as:

- **Invitations** – the number of external assessors invited to review an application.
- **Resend** – the number of invitations that have been resent due to no response being received within the four day response period.
- **Accepted** – the number of external assessors who have accepted to review an application.
- **Completed** – the number of completed assessments.
- **Declined** – the number of external assessors who have declined to review an application.
- **Overdue** – the number of assessments which are past the due date.
- **Cancelled** – the number of invitations cancelled for an application.
5. Enter the desired number range(s) in the available fields.

For example, you could filter for applications where there are:

- Less than two accepted invitations,
- Less than two completed assessments (see Figure 3)
- One or more overdue assessments etc.

![Assigner Application List](image)

**Figure 39 - Assigner Application List: Filter Example**

6. After defining these criteria, select **Filter**.

7. The filters can be reset by clearing any values from the fields and selecting **Filter**.
9.2 Monitoring external assessors’ progress on individual applications

The progress of an external assessor for each application is detailed in and managed through the **Assignments** table. The information provided in this table can be customised to aid Assessors Academy members to monitor the progress of invitations, responses and assessments.

Instructions on customising the **Assignments** table are outlined below.

1. From the RGMS Home page select the **Assessors** tab.
2. Navigate to the **Quicklinks for Assessors** section and select the **Monitor and manage assigned applications** quicklink.

![Figure 40 – Accessing the Assigners Page and Monitor and Manage Assigned Applications Quicklink](image)

3. Ensure the standard filter preferences are selected and select **Filter**. For more information refer to section 2.1 **Setting an Assessors Custom Filter**.
4. Select an application by selecting the hyperlink in the **Application ID** column, you will be directed to the **Assigner Application: Properties** page.
5. Navigate to the **Properties** tab dropdown menu and select the **Assignments** link in the menu. The **Assignments** table for this application will be displayed.

![Assigner Application: Properties](image)

**Figure 41 – Assignments Table**

Actions associated with potential external assessors for this application are recorded in this table. The status of each potential external assessor is represented by a coloured arrow defined below:

- **New** – a potential external assessor who has not been invited. This will include individuals who may have been considered as potential reviewers but were not approached because of their unavailability.
- **Decision Pending** – an invitation has been sent, but a decision has not been entered in RGMS.
- **Accepted** – an invitation has been accepted.
- **Inactive** – an invitation to this external assessor has been either cancelled or declined.

Assigners Academy members can use the **Status** filter to customise the external assessors displayed in the table, based on their progress. For example, you may want to only see the external assessors who are yet to respond to the invitation. How to customise the external assessors listed is outlined in the instructions below.

6. Select the type of status from the **Status** field it will become highlighted in blue.

7. Select the **Filter** button.
It is possible to filter for multiple status types concurrently. For example, you can choose to display only those external assessors who are either **New** or **Decision Pending**. To view multiple status types, hold the Shift or Ctrl key while clicking the required types, then select Filter. To display all the status types select **Show All**.

The status type(s) you choose to display in the table for one application will carry over to all other applications until you change your filter selections again.

### 9.3 Extend the Due Date for External Assessment/s

External assessors are initially requested to complete their assessments within 14 calendar days from the date they accept the invitation. Once an external assessor accepts the invitation to review an application, the Assigners Academy member may change the due date, if required. The due date cannot be extended past the final completion date for that application outlined in RGMS.

Instructions on **changing/extend the due date of an assessment** are outlined below.

1. From the **RGMS Home** page select the **Assigners** tab.
2. Navigate to the **Quicklinks for Assessors** section and select the **Monitor and manage assigned applications** quicklink.

![Figure 42 – Accessing the Assigners Page and Monitor and Manage Assigned Applications Quicklink](image-url)
3. Ensure the standard filter preferences are select and select **Filter**. For more information refer to section 2.1 Setting an Assigners Custom Filter.

4. Select an application by selecting the hyperlink in the Application ID column, you will be directed to the **Assigner Application: Properties** page.

5. Navigate to the **Properties** tab dropdown menu and select the Assignments link from the menu.

6. Select the hyperlink in the Last Name column of the relevant external assessor.

7. Review the **Assessment Must Be Completed By** date for this assessment. Any extension to the assessment due date cannot be past this date which has been pre-determined by NHMRC.

8. Select the calendar icon next to the **Assessment Due Date** field. A calendar will appear as a pop-up window under the field.

9. Select the new date of the assessment.

10. Select **Save**.

![Figure 43 - Assigner Application page: Assessment Due Date](image)

If you extend the due date of an assessment that was flagged as overdue, it will reset, removing the overdue assessment flag. The external assessor will be notified that the due date has changed.
Assigners Academy members may wish to approach the same potential external assessors for multiple applications. Once external assessors have been approached for one application their information can be transferred to other applications. The instructions below outline this process.

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

2. Select the **Monitor and manage assigned applications** quicklink.

![Figure 44 – Accessing the Assigners Page and Monitor and Manage Assigned Applications Quicklink](image)

3. Ensure the standard filter preferences are selected and select **Filter**. For more information refer to section **2.1 Setting an Assigners Custom Filter**.

4. Select an application by selecting the hyperlink in the **Application ID** column, you will be directed to the **Assigner Application: Properties** page.

5. Navigate to the **Properties** tab dropdown menu at the top of the page and select **Copy Assignments** link from the menu.

6. Against the **Assignees/Candidates** field, select the external assessor(s) who have been approached for that application whom you wish to also approach for other application(s) by clicking the binoculars icon.

7. Against the **Target Applications** field, select the application(s) that you want the external assessor(s) added to by either typing directly into the field and selecting from the options provided or by clicking the binoculars icon.

8. Select **Yes** from the **Create Assignments** drop down field.
9. Select **Save and Return**.

10. Select the hyperlink in the **Application ID** column of the relevant application.

    Navigate to the **Properties** tab dropdown menu and select **Assignments** link from the menu. The external assessor(s) will appear in the **Assignments** table of the target application(s). They will not have been invited to review the target application(s). Refer to **section 6.1 Inviting External Assessors** to add the external assessor to review the application(s).