



Australian Government
National Health and Medical Research Council

NHMRC

Research Grants Management System
Assigner Processes Quick Reference Guide
Part 5. Monitoring Invitations to Potential External Assessors
Target Audience – Assigners Academy
Version 1.0 – 15 February 2017

MONITORING INVITATIONS TO POTENTIAL EXTERNAL ASSESSORS

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1. Introduction

IMPORTANT NOTE:

The material in this Quick Reference Guide (QRG) is intended to complement other QRGs for Assigners and the *RGMS User Guide – Assigner Processes 2017*, available under the *Assigner Resources* section on the [RGMS Training Program](#) page of the NHMRC Website.

Support:

Further information and assistance with Assigner processes is available from the Assigners Academy Team via email or from NHMRC's Research Help Centre (RHC) by phone between 9am and 5pm AEST/AEDT Monday to Friday.

Email	academy@nhmrc.gov.au
Phone	1800 500 983 (or +61 2 6217 9451 for international callers)

IMPORTANT NOTE:

NHMRC encourages inviting Overseas External Assessors (OSEA) to review an application. Before inviting assessors residing overseas – including New Zealand – please note that conditions applying to an OSEA are different from conditions that apply to an assessor residing in Australia:

- An OSEA DOES NOT use RGMS to complete an assessment, instead completing an offline assessment template which is then emailed to nhmrc.overseasassessments@nhmrc.gov.au
- NHMRC staff will upload completed OSEA assessments into RGMS.
- Please do not instruct an OSEA to open an account in RGMS. An OSEA should not open an RGMS account for the sole purpose of submitting an assessment. An OSEA will not be granted a new account in RGMS.
- Even if an OSEA appears to have an RGMS account, it cannot be used to complete an external assessment. An OSEA profile in RGMS is incompatible with the external assessment process.
- Assigners CANNOT accept an invitation on behalf of an OSEA in RGMS. Forward all OSEA correspondence indicating acceptance to nhmrc.overseasassessments@nhmrc.gov.au
- For clarification on matters regarding an OSEA, see the *Assigner Processes Quick Reference Guide Part 4 – Inviting Overseas External Assessors (OSEA)* or the *RGMS User Guide – Assigner Processes 2017* under the *Assigner Resources* Section on the [RGMS Training Program](#) page of the [NHMRC Website](#), or contact nhmrc.overseasassessments@nhmrc.gov.au

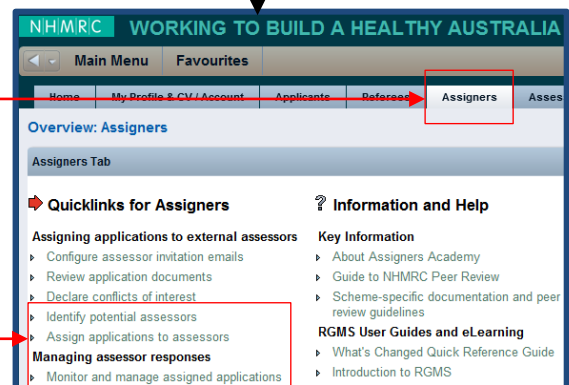
2. Monitoring External Assessor (EA) Progress for Multiple Applications

How to Navigate

From the *RGMS Home Page*, complete the following:

- Select *Assgners* tab>Quicklinks for Assgners >One of the last three links (all three open the same page).
- The *Assigner Application List* page opens.

What it looks like



By default, the *Assigner Application List* page displays applications for which you are responsible, sorted by application number. The columns on the centre-right provide a status summary of your applications.

Assigner Application List

Filter: System Default

Round: 2017_Project Grant_Funding_

Assigner: []

Application: []

Assessment Type: Scientific, Industry/Commercial, Indigenous

Declaration Complete?: All

Col: All

Assigned: Yes (Yes: only display applications the assigner is responsible for. All: display all applications the assigner is potentially responsible for.)

Active Applications: Yes (Yes: exclude withdrawn applications.)

Assigner Suitability: All

Filter Save Filter Clear

Invitations: [] to []

Resend: [] to []

Accepted: [] to []

Completed: [] to []

Declined: [] to []

Overdue: [] to []

Cancelled: [] to []

Col	Assigner Suitability	Declaration Complete?	Assigner	Application	Title	Application Team	Invitations	Resend	Accepted	Completed	Declined	Overdue	Cancelled	Note
<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	[]	APP1 CIA -	E	CIA - CIB - CIC - CID - CIE - CIB - CIC - CID - CIE - CIB - CIC - CID - CIE -	3	0	2	2	1	0	0	
<input type="checkbox"/>	Moderate	<input checked="" type="checkbox"/>	[]	APP1 CIA -	C	CIA -	2	0	2	2	0	0	0	
<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	[]	APP1 CIA -	A	CIA - CIB -	2	1	2	2	0	0	0	
<input type="checkbox"/>	Limited	<input checked="" type="checkbox"/>	[]	APP1 CIA -	U	CIA - CIB - CIC - CID - CIE - CIB - CIC - CID - CIE -	5	2	2	2	2	0	1	
<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	[]	APP1 CIA -	T	CIA - CIB -	8	1	2	2	2	0	1	

How to Navigate

What it looks like

You may find it convenient to arrange the data differently. For example, you may wish to know how many of your applications have not yet had any invitations accepted. Click on the title of the *Accepted* column and RGMS re-sorts the data from low-to-high, by the number of accepted invitations.

Application Team	Invitations	Resend	Accepted▲	Completed	Declined	Overdue	Cancelled
CIA - Associate Professor	4	0	0	0	2	0	2
CIB - Professor							
CIC - Associate Professor							
CIA - Doctor	2	3	0	0	0	0	0
CIB - Associate Professor							
CIC - Doctor							

Click on the title of the *Accepted* column again to re-sort the data from high-to-low. This table can be sorted by any column, high-to-low or low-to-high, as suits your needs.

Application Team	Invitations	Resend	Accepted▼	Completed	Declined	Overdue	Cancelled
CIA - Professor	2	0	2	2	0	1	0
CIA - Professor	3	1	2	2	1	0	0
CIB - Professor							
CIC - Professor							

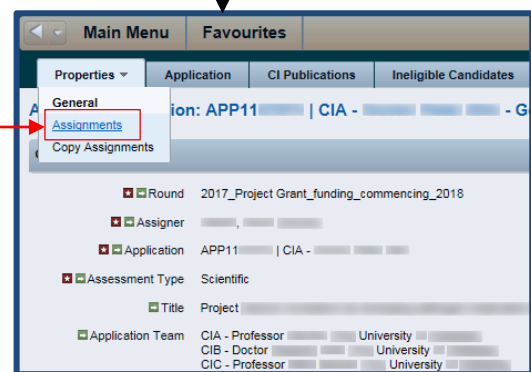
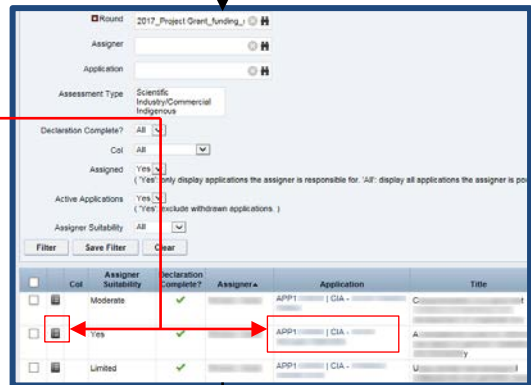
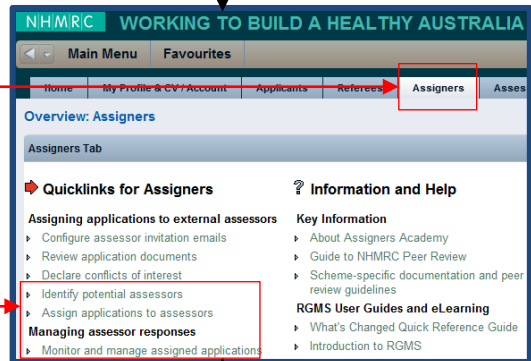
3. Monitoring EA Progress for a Specific Application

How to Navigate

From the *RGMS Home Page*, complete the following:

- Select *Assgners* tab>Quicklinks for Assgners >One of the last three links (all three open the same page).
- The *Assgner Application List* page opens.
- Open the required application by selecting either the *Properties* icon or the *Application hyperlink*.
- The *Assgner Application: General – Properties* page opens.
- Under the *Properties* tab, select the *Assignments* link to open the *Assgner Application: Assignments Properties* page. The *Assgner Application: Assignments Properties* page is the starting point for all subsequent instructions in this guide.

What it looks like



How to Navigate

What it looks like

The *Assigner Application: Assignments Properties* page opens. This page provides a status of each EA and OSEA assigned to the application, as well as a summary-at-a-glance of each invitation.

Status Filter – By default, all options are selected. Click different options to toggle on/off and then select *Filter* to change the display.

Indicates OSEA or no RGMS account

**Yellow – Invitation sent but no reply
Blue – Declined or Cancelled
Green – Invitation Accepted
Grey – Invitation ready but not sent**

Info	RGMS Profile?	Eligible?	Status	Last Name	First Name	Title	Invitation	Resend Invite	Col Ruling Request?	Col Ruling	Decision	Decision Date	Assessment Complete	Assessment Overdue	Cancelled	Note	
							23/02/17										
							23/02/17										
							26/04/17	30/04/17			Accepted	10/05/17					
							13/04/17				Declined	13/04/17					
							13/04/17				Declined	14/04/17					
							26/04/17	30/04/17			Declined	30/04/17					
							11/05/17	2/06/17			Declined	11/05/17			2/06/17		
Completed Invitations							7						1				
Cancelled																1	

Invitation categories by Date and Status

Info	RGMS Profile?	Eligible?	Status	Last Name	First Name	Title	Invitation	Resend Invite	Col Ruling Request?	Col Ruling	Decision	Decision Date	Assessment Complete	Assessment Overdue	Cancelled	Note	
							23/02/17									*** APP1 Summary pdf not found. Invitation not sent. Please contact an NHMRC staff member ***	
							23/02/17										
							26/04/17	30/04/17			Accepted	10/05/17	20/05/17				
							13/04/17				Declined	13/04/17					
							13/04/17				Declined	14/04/17					
							26/04/17	30/04/17			Declined	30/04/17					
							11/05/17	2/06/17			Declined	11/05/17			2/06/17		
Totals							7						1			1	

4. Extending the Due Date for External Assessments

IMPORTANT NOTE:

The login profile of Assigners Academy members allows Assigners to extend the due date of external assessments.

How to Navigate

What it looks like

From the *Assigner Application: Assignments Properties* page, click on the *Last Name* of the EA for whom you wish to extend an assessment due date.

Filter	Show All	Save Filter	Clear	Info	RGMS Profile?	Eligible?	Status	Last Name	First Name	Title
					✓	✓	↕			
					✓	✓	↕			
					✓	✓	↕			
					✓	✓	↕			
					✓	✓	↕			
					✓	✗	↕			

The *Assigner Application: Assignment Properties* page opens. Review the *Assessment Must Be Completed By* date. RGMS will not process an extension past this date.

Assigner Application: APP11 | CIA - Professor | Assignment: - Assignment Properties

Candidate *** Do Not Make Any Changes On This Page Until The Name And Contact Fields Are Populated (By Refreshing The Page) ***

Title: Doctor
First Name: L
Last Name: R
Institution: [Field]
Email: testing.capture@nhmrc.gov.au
Note (200 chars): [Field]

Progress

Invitation Date: 18/04/2017
Decision Date: 13/12/2017
Resend Email Date: 22/04/2017
Cancel Date: .

Candidate's Decision: Accepted (Assigner)
(The candidate should not click the accept/decline link in the invitation email if you enter his/her decision. 'Accept' is only available for candidates with an RGMS profile. If a Col ruling has been requested, a decision cannot be selected until a ruling is entered)

Assessment Due Date: 15/06/2017
(If left empty when an acceptance is entered, RGMS will set this field to 14 days after the decision date)

Assessment Overdue:

Assessment Must Be Completed By: 04/07/2017

Assessment Complete: .

How to Navigate

What it looks like

Select the *Calendar* icon. A *Calendar* appears in a pop-up window. Click on the appropriate *Date* to assign a new deadline to the assessment.

The screenshot shows the 'Assignment Properties' form. The 'Assessment Due Date' field is set to 15/06/2017. A calendar pop-up is displayed over this field, showing the month of June 2017. The date 30 is highlighted in the calendar. The 'Save And Return' button is highlighted in red. The form includes fields for Candidate details (Title, First Name, Last Name, Institution, Email), Progress (Invitation Date, Decision Date, Candidate's Decision, Assessment Due Date, Assessment Complete), and Declined (Reason for Declining). A 'Save' button is also visible.

Select *Save and Return* to register the extended due date for the assessment in RGMS.



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