



Australian Government  
National Health and Medical Research Council

NHMRC

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Research Grants Management System  
Assigner Processes Quick Reference Guide  
Part 4. Inviting Overseas External Assessors (OSEA)  
Target Audience – Assigners Academy  
Version 1.0 – 10 February 2017

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# OVERSEAS EXTERNAL ASSESSOR (OSEA) PROCESSES

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# 1. Introduction

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**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.

<b>Email</b>	<a href="mailto:academy@nhmrc.gov.au">academy@nhmrc.gov.au</a>
<b>Phone</b>	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](mailto: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](mailto:nhmrc.overseasassessments@nhmrc.gov.au)
- For clarification on matters regarding an OSEA, see the *RGMS User Guide – Assigner Processes 2017* on the [RGMS Training Program](#) page of the [NHMRC Website](#), or contact [nhmrc.overseasassessments@nhmrc.gov.au](mailto:nhmrc.overseasassessments@nhmrc.gov.au)

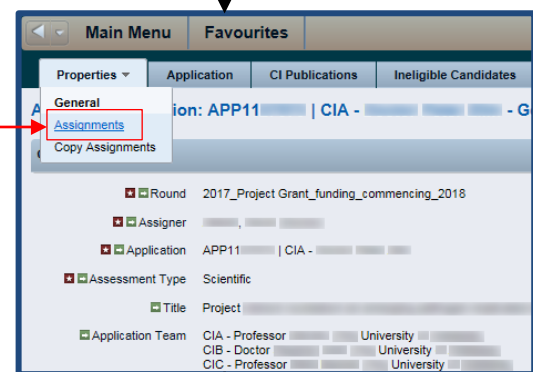
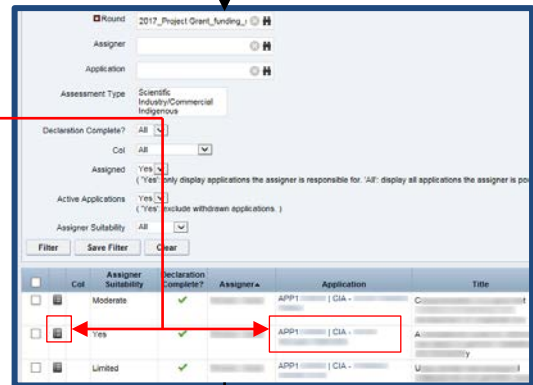
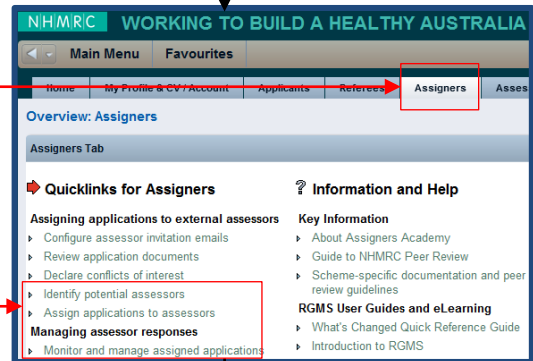
## 2. Assigning an OSEA to an Application

### How to Navigate

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

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

### What it looks like



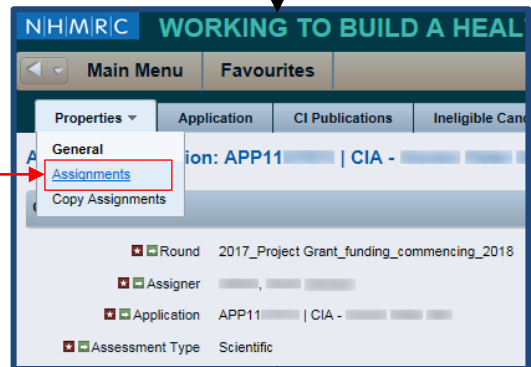
**IMPORTANT NOTE:**

You may assign any number of *potential* EAs/OSEAs to an application, but there can only be two active invitations per application at any given time.

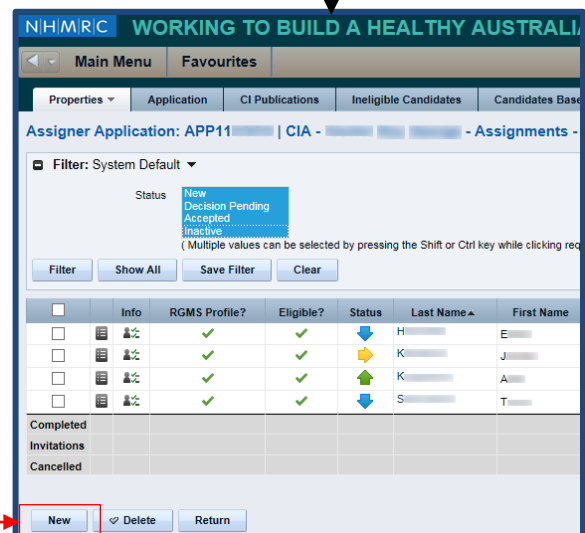
How to Navigate

What it looks like

To initiate the process of assigning an EA to an application, select the *Assignments* link under the *Properties* tab.



The *Assigner Application: Assignments Properties* page opens.



At the bottom of the display, click the *New* button.

The *Assigner Application: Create Assignment* page opens.

## How to Navigate

DO NOT use the *Candidate With RGMS Profile* field to assign an OSEA to an application. Although some OSEAs have RGMS accounts, their profiles are not compatible with entering data into RGMS Assessment fields. Using this field will cause difficulties.

Use the *Candidate Without RGMS Profile* fields for OSEAs **residing outside Australia** (or for Australian researchers without an RGMS account). Select *Save and Return* when finished.

The *Assigner Application: Assignments – Properties* page opens. You will see the potential OSEA is assigned to the application. Even if the potential OSEA has an RGMS account, it is essential to ensure that a red and white 'X' appears in the *RGMS Profile?* column.

You are now able to invite the potential OSEA to review the application.

## What it looks like

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Main Menu Favourites

Assigner Application: APP11 | CIA - - Create Assignment

Hints & Instructions

Click 'SAVE AND RETURN' after selecting or entering a candidate assessor. Then refresh the page.

Candidate With RGMS Profile

Candidate

Candidate Without RGMS Profile

Title [-Select-]

First Name

Last Name

Email (Ensure this is populated if the candidate doesn't have an RGMS profile)

Institution

Save Save And Return Return

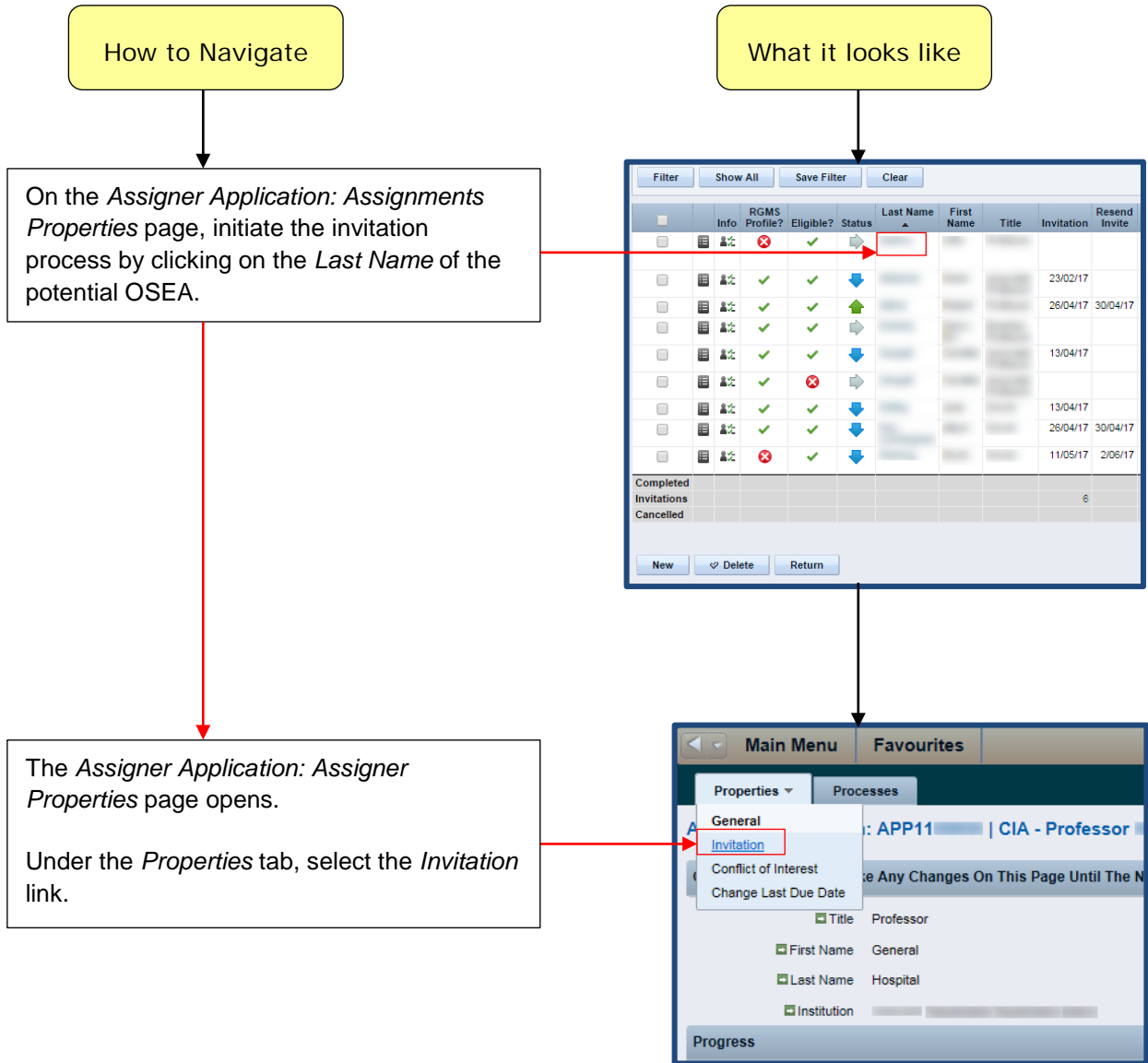
= Enter Once

Filter Show All Save Filter Clear

	RGMS Profile?	Eligible?	Status	Last Name	First Name	Title	Invitation	Resend Invite
	X	✓	→					
	✓	✓	↓				23/02/17	
	✓	✓	↑				26/04/17	30/04/17
	✓	✓	↓				13/04/17	
	✓	✓	↓				13/04/17	
	✓	✓	↓				26/04/17	30/04/17
	✓	✓	↓				11/05/17	2/06/17
Completed								6
Invitations								
Cancelled								

New Delete Return

### 3. Sending an Invitation to an OSEA



How to Navigate

What it looks like

The *Assigner Application: Assigner Properties* page now displays the *Email Text* and *Actions* banners.

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

**Email Text**

**Invitation (2000 characters)**  
 As a member of the 2017 Assigners Academy, I have been tasked with identifying and securing external assessors for grant applications. I would be most grateful if you could be an external peer reviewer for the above application.  
 I have approached you, as I believe your expertise in this field of research will complement the other assessments that will be provided.  
 I have attached the Application Summary so you can determine whether you find this application to be appropriately within the bounds of your skills and expertise to provide a written assessment and whether you may have a possible Conflict of Interest that might prevent you from providing an assessment.

**Cancellation (2000 characters)**  
 You were recently invited to provide an external assessment of the above NHMRC grant application.  
 I appreciate your willingness to undertake this role for the above application. However, due to unforeseen circumstances no further action is required from you at this time.  
 (The invitation cannot be cancelled until this field is populated and saved)

**Actions**

Candidate Is A Friend?  (A friend's preferred name)

Preferred Name: Bob

Candidate Lives Overseas?  Yes  No

CIA Gave Consent For An Overseas Assessor?  Yes  No

Candidate is Eligible?  Yes  No (Ineligible candidates cannot be invited)

Send Invitation Email  Yes  No (able to invite)

Cancel Automatic Email Resend  Yes  No (Automatic)

Buttons: Save, Save And Return, Return

Required  Enter Once

**Is candidate an OSEA? Ensure Yes is selected.**

**An OSEA cannot be invited if a Red X appears here.**

**RGMS will not send the invitation if a Red X appears here.**

**Select Yes from the dropdown if you are ready to send the invitation.**

**Select Yes from the dropdown to cancel Automatic Resend after four days with no reply, if desired.**

Invitation Text – To amend default text, click into the *Invitation* field and apply standard text editing techniques. Changes you make will apply to this invitation only. If field is empty, no invitation can be sent.

When you are satisfied the *Invitation* text is as you prefer and the *Actions* menus are correct, select *Save and Return*. RGMS generates an invitation email to the potential OSEA.

Selecting *Save and Return* re-opens the *Assigner Application: Assignments Properties* page. Note the *Status Arrow* corresponding to the OSEA you just invited has changed to *yellow*. You may have to refresh your browser for the arrow to display correctly.

Filter	Show All	Save Filter	Clear		RGMS Profile?	Eligible?	Status	Last Name	First Name	Title	Invitation	Resend Invite
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				23/02/17	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				23/02/17	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				26/04/17	30/04/17
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				13/04/17	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				13/04/17	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				26/04/17	30/04/17
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				11/05/17	2/06/17
Completed Invitations											7	
Cancelled												

Buttons: New, Delete, Return



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## 4. Cancelling an Invitation to an OSEA

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The procedure to cancel an invitation to an OSEA is the same procedure used to cancel an invitation to a standard Australian EA. This process is described in *Section 3.2 Cancel an Invitation to an External Assessor* in the *Quick Reference Guide – Assigner Processes Part 3. Sending Invitations to Potential External Assessors*. You can find this Guide on the [RGMS Training Program](#) page of the NHMRC Website.

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## 5. Accepting or Declining an Invitation on behalf of an OSEA

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An OSEA may reply directly to you, rather than following instructions contained in the invitation. While RGMS provides a function to accept or decline an invitation on behalf of a standard Australian EA, RGMS does not provide this function for OSEAs. If an OSEA replies directly to you, **DO NOTHING IN RGMS**. Instead, please forward replies regarding OSEA acceptance to: [nhmrc.overseasassessments@nhmrc.gov.au](mailto:nhmrc.overseasassessments@nhmrc.gov.au)

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## 6. Potential OSEA Conflicts of Interest (CoI)

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Unlike the invitation to a standard Australian EA, OSEA invitations do not provide a link for the OSEA to declare a potential CoI. If contacted by an OSEA regarding a potential CoI, please forward the communication to: [nhmrc.overseasassessments@nhmrc.gov.au](mailto:nhmrc.overseasassessments@nhmrc.gov.au)



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[www.nhmrc.gov.au](http://www.nhmrc.gov.au)