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National Health and Medical Research Council

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Research Grants Management System (RGMS)  
2018 Assigner Processes Quick Reference Guide  
Part 3. Sending Invitations to Potential  
External Assessors

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# 2018 ASSIGNER PROCESSES QUICK REFERENCE GUIDE

## PART 3. SENDING INVITATIONS TO POTENTIAL EXTERNAL ASSESSORS

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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 Academy members and the *RGMS User Guide – Assigner Processes*, available on the [Assigners Academy page](#) of the NHMRC Website.

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:**

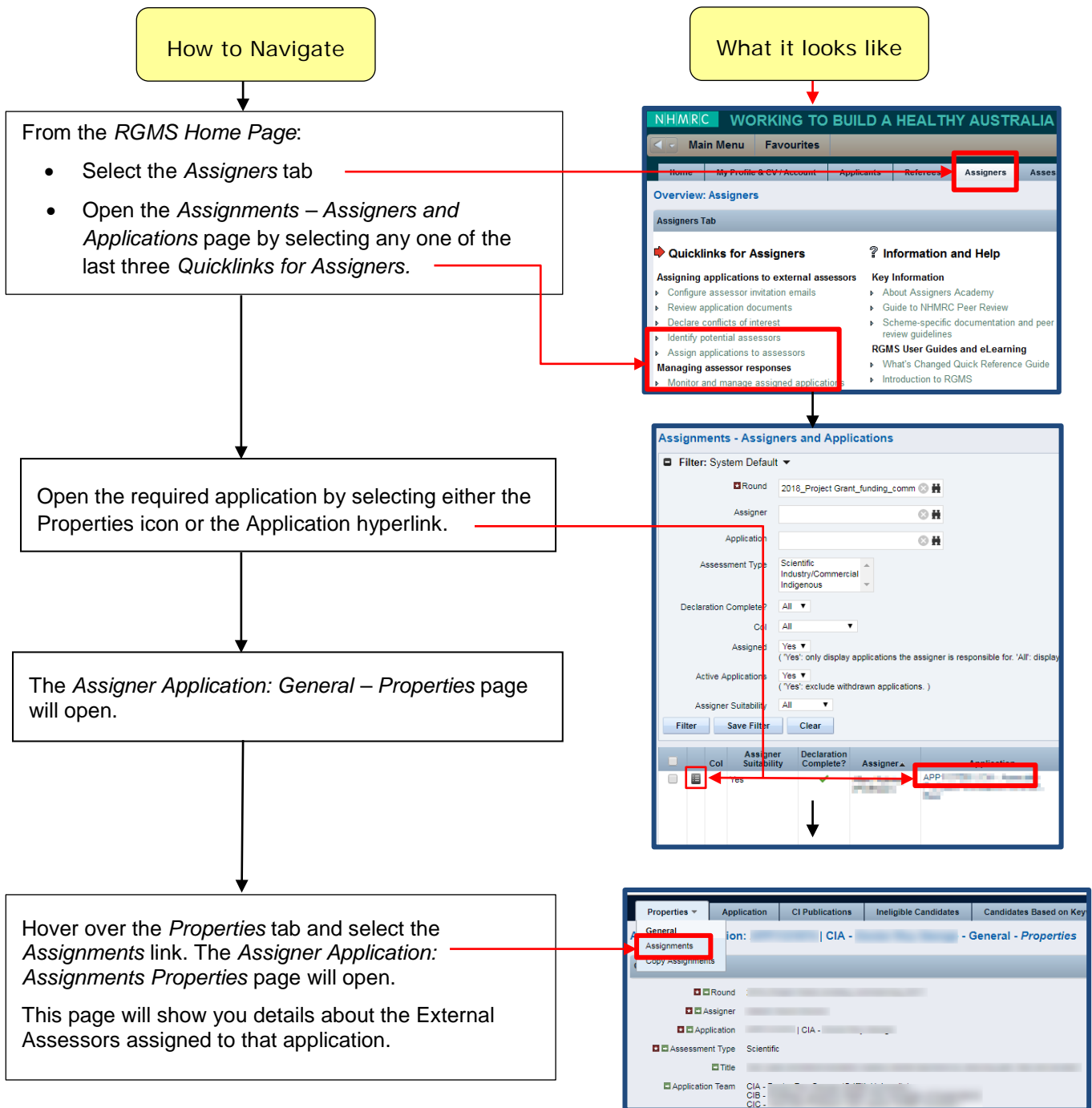
This Quick Reference Guide refers to processes involving assessors based at overseas institutions. Please note the following key differences in the process of securing external assessments from OSEAs:

- OSEAs do not utilise RGMS directly for responding to invitations, declaring COIs, or submitting assessments, and Academy members cannot do this on behalf of an OSEA in RGMS. Please forward any email correspondence from OSEAs to [nhmrc.overseasassessments@nhmrc.gov.au](mailto:nhmrc.overseasassessments@nhmrc.gov.au) to assist NHMRC in co-ordinating these processes.
- When setting up a new invitation instance, use the *Candidate Without RGMS Profile* field. It is important for NHMRC to be able to trace assessments contributed by assessors at overseas institutions, so please do not send invitations to OSEAs via an existing RGMS account.
- When sending an invitation, ensure that the *Candidate Lives Overseas?* drop-down menu is set to “Yes”.
- OSEAs will not receive RGMS-generated email reminders in advance of the deadline for submitting assessments. Please maintain direct contact with the OSEA to ensure that this deadline is met.

Further information can be found in *Quick Reference Guide Part 4. Inviting Overseas External Assessors (OSEA)* and the *RGMS User Guide – Assigner Processes*, which are available on the [Assigners Academy page](#) of the NHMRC website.

## 2. Getting Started

### 2.1. Accessing the Assigner Application: Assignments – Properties Page





### 3. Managing External Assessor Invitations

#### 3.1. Inviting a Potential External Assessor

**IMPORTANT NOTE:**

There can only be two active (pending/accepted) invitations per application at any given time.

How to Navigate

What it looks like

Navigate to the *Assigner Application: Assignments Properties* page as described in [section 2.1](#).

Click on the *Info* icon to verify that your candidate:

- Has not already accepted the maximum number of invitations (six)
- Is not a GRP member
- Is currently available

To initiate the invitation process, click on the *Last Name* of the potential assessor.

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

The *Assigner Application: Assignment Properties* page will open.

Hover over the *Properties* tab and select the *Invitation* link. The *Assignment Application: Assignment Properties* page will change to display invitation fields.

Main Menu Favourites

Properties Processes

General: APP11 | CIA - Professor

Invitation

Conflict of Interest

Change Last Due Date

Title Professor

First Name General

Last Name Hospital

Institution

Progress

How to Navigate

What it looks like

Verify the *Invitation* text is correct. You can amend it if you wish; however, any changes you make will apply to this invitation only. Additional options can also be customised in the *Actions* section.

If no text appears in the *Invitation* field, your Assigner stationery has not been set up correctly. Refer to section 2.5 of *Quick Reference Guide Part 1. Initial Tasks* for more details.

**Candidate is A Friend?** If you want to customise the invitation greeting, tick this box and enter a name in the *Preferred Name* field. The invitation will be addressed "Dear [Preferred Name]".

**Candidate Lives Overseas?** Select **Yes ONLY** if the candidate is based at an overseas institution. If the candidate is based at an Australian institution, select **No**. If you send the invitation with the wrong option selected, you must cancel the invitation and re-send it with the correct option selected.

**CIA Gave Consent For An Overseas Assessor?** An OSEA cannot be invited if appears in this box.

**Candidate is Eligible?** RGMS will not send an invitation if appears in this box.

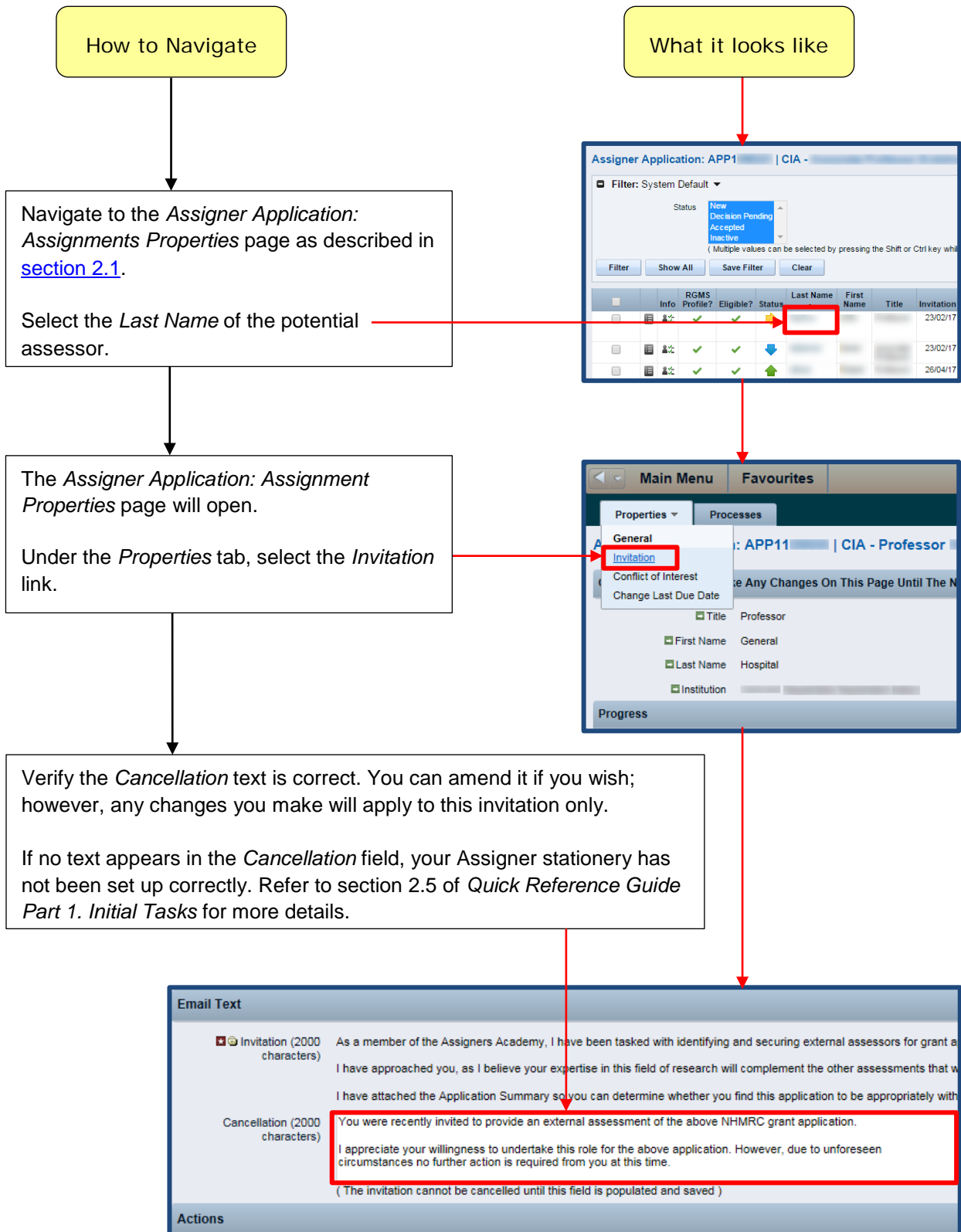
**Cancel Automatic Email Resend** – RGMS will automatically resend any invitation emails that have not received a response after two days. Select **Yes** from the drop down menu to cancel this process.

When you are satisfied the *Invitation* text is as you prefer and the *Actions* options are correct, select **Yes** from the *Send Invitation Email* drop down, then select **Save and Return**. RGMS will generate and send an invitation email to the potential External Assessor.

Selecting **Save and Return** re-opens the *Assigner Application: Assignments Properties* page. Note the *Status* arrow for the assessor you just invited has changed from grey to yellow. You may have to refresh your browser (F5 for PC, Command+R for Mac) for the arrow to display correctly.

Info	RGMS Profile?	Eligible?	Status	Last Name	First Name	Title	Invitation
							23/02/17
							23/02/17
							26/04/17

## 3.2. Cancelling an Invitation





## How to Navigate

## What it looks like

Under the *Actions* banner, select *Yes* from the *Cancel Invitation* dropdown menu on the right hand side of the page.  
If you prefer an informal greeting, tick the *Candidate Is A Friend?* box and enter a name in the *Preferred Name* field.  
Select *Save and Return*.

The screenshot shows the 'Actions' form in RGMS. The form contains several fields and checkboxes:

- Candidate Is A Friend?**: Checked (Yes). Below it is a text field for 'Preferred Name' containing 'Bob'.
- Candidate Had Made a Declined Invitation?**: Unchecked (No).
- Cancel Invitation (is email text appropriate?)**: A dropdown menu with 'yes' selected.
- Send Invitation Email**: Checked (Yes).
- Cancel Automatic Email Resend**: A dropdown menu with '[-Select-]' selected.

At the bottom of the form, there are three buttons: 'Save', 'Save And Return', and 'Return'. The 'Save And Return' button is highlighted with a red box. A legend at the bottom left explains the icons: a red square for 'Required', a blue square for 'Enter Once', and a green circle for 'Locked by Process'.

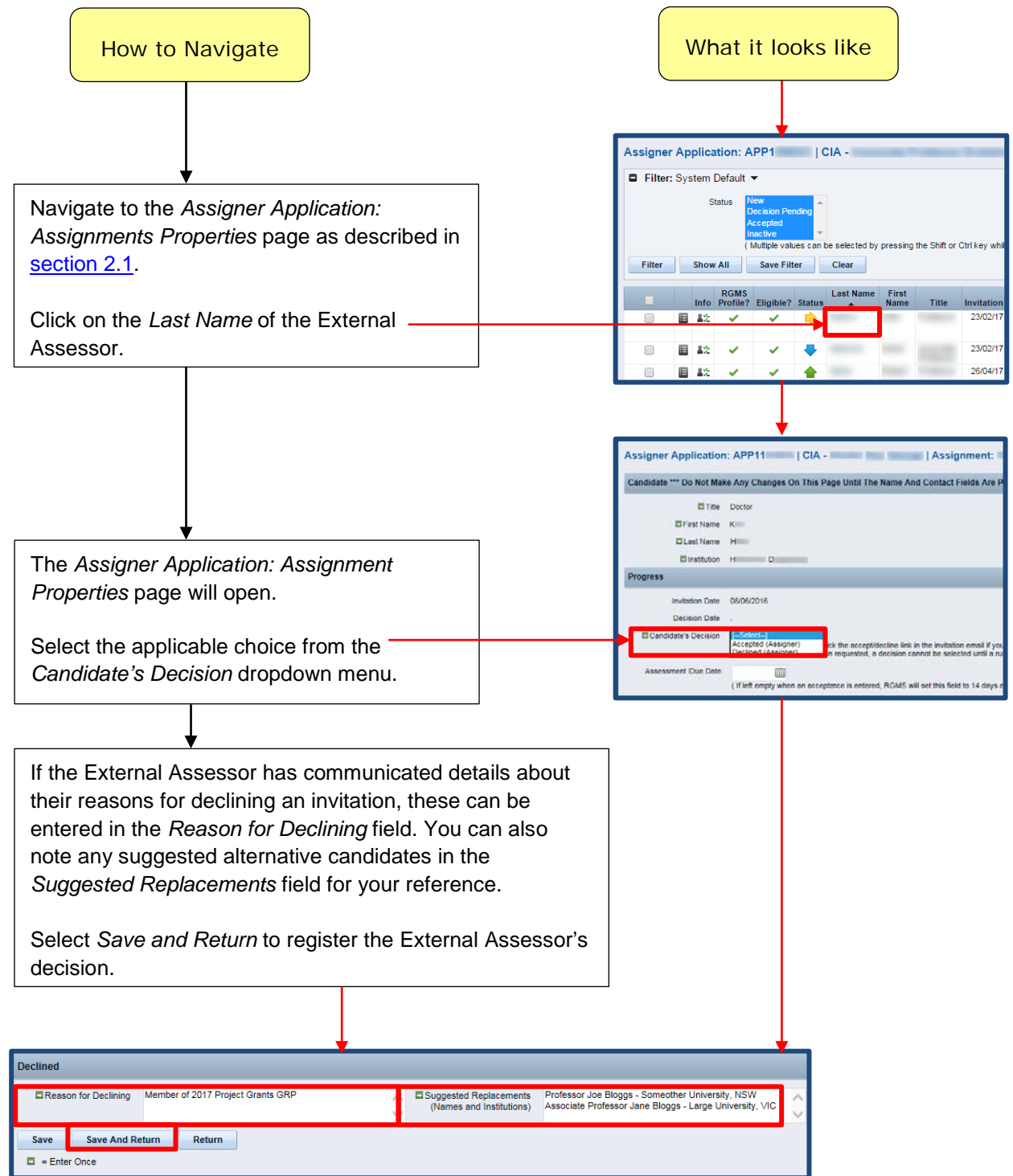
RGMS will generate and send a cancellation email to the External Assessor. They will no longer be able to access this application in RGMS. The *Status* arrow for the assessor you just invited will change from yellow or green to blue. You may have to refresh your browser (F5 for PC, Command+R for Mac) for the arrow to display correctly.

To re-invite the same External Assessor to the application at a later stage, they must be re-assigned to the application and sent a new invitation (see section 2.5.2 of *Quick Reference Guide Part 2. Selecting Potential External Assessors* and [section 3.1](#) of this guide).

### 3.3. Responding to an Invitation on behalf of a Potential External Assessor

**IMPORTANT NOTE:**

The processes described below should only be followed for External Assessors based at Australian institutions. If an OSEA replies directly to you, **DO NOTHING IN RGMS**. Instead, please forward all OSEA correspondence to [nhmrc.overseasassessments@nhmrc.gov.au](mailto:nhmrc.overseasassessments@nhmrc.gov.au).



### 3.4. External Assessor Conflicts of Interest

**IMPORTANT NOTE:**

Academy members may be required to rule on potential CoIs declared by External Assessors. NHMRC staff can assist with this process. In the first instance, please refer to section 2.4 of *Quick Reference Guide Part 1. Initial Tasks*.

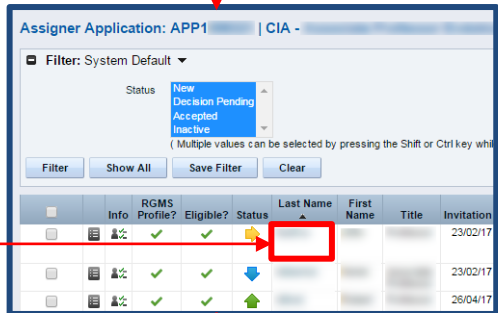
If the External Assessor is based at an Australian institution, their invitation email will have instructed them to declare any potential CoIs in RGMS. You will receive an email that takes you directly to the *Assigner Application: Assignment Properties* page where you can rule on the potential CoI.

**OSEAs DO NOT declare potential CoIs in RGMS.** Please forward any OSEA emails requesting a CoI ruling to [nhmrc.overseasassessments@nhmrc.gov.au](mailto:nhmrc.overseasassessments@nhmrc.gov.au).

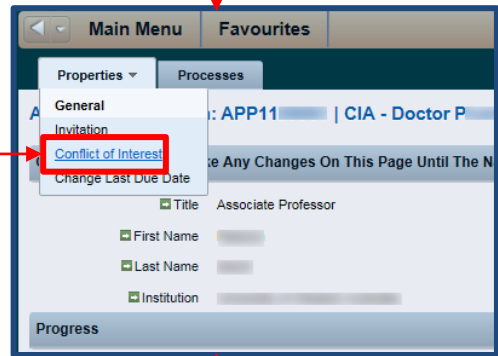
How to Navigate

What it looks like

Navigate to the *Assigner Application: Assignments Properties* page as described in [section 2.1](#).  
Select the *Last Name* of the potential External Assessor.



The *Assigner Application: Assignment Properties* page will open.  
Under the *Properties* tab, select the *Conflict of Interest* link.



The *Col Ruling Requested?* box will be ticked.

- Review the comments in the *Col Comments – Candidate* field.
- Enter any comments of your own in the *Col Comments – Assigner/NHMRC* field.
- Use the *Col Ruling* dropdown menu to select the appropriate ruling.
- Select *Save and Return*.

RGMS will notify the External Assessor of the ruling you have made.

