2018 ASSIGNER PROCESSES QUICK REFERENCE GUIDE

PART 4. INVITING OVERSEAS EXTERNAL ASSESSORS (OSEA)

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1. Introduction

**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](https://assigners-academy.nhmrc.gov.au) 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.

<table>
<thead>
<tr>
<th>Email</th>
<th><a href="mailto:academy@nhmrc.gov.au">academy@nhmrc.gov.au</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>1800 500 983 (or +61 2 6217 9451 for international callers)</td>
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**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 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 the *RGMS User Guide – Assigner Processes*, which is available on the [Assigners Academy page](https://assigners-academy.nhmrc.gov.au) of the NHMRC website.
2. Assigning an OSEA to an Application

IMPORTANT NOTE:
You may assign any number of External Assessors to an application, but there can only be two active (pending/accepted) invitations per application at any given time.

How to Navigate

From the RGMS Home Page:
- Select the Assigners tab
- Open the Assignments – Assigners and Applications page by selecting any one of the last three Quicklinks for Assigners.

Open the required application by selecting either the Properties icon or the Application hyperlink.

The Assigner Application: General – Properties page will open.

Hover over the Properties tab and select the Assignments link.

The Assigner Application: Assignments Properties page will open.
To assign an OSEA to the application, click the **New** button at the bottom of the page. The **Assigner Application: Create Assignment** page will open.

- **Assigned** – invitation has not yet been sent.
- **Pending** – invitation has been sent, but a decision has not yet been received.
- **Accepted** – invitation has been accepted
- **Inactive** – invitation has been declined or cancelled.

**Status Filter** – By default, all options in this field are selected (highlighted in blue).

To refine your display, deselect an option, then select **Filter**.

To de/select more than one status at time, hold down the Ctrl key whilst clicking the options you require.
DO NOT use the Candidate With RGMS Profile field to assign an OSEA to an application, even if they have an RGMS account.

Instead, enter the details of the OSEA into the Candidate Without RGMS Profile fields.

Select Save and Return.

The Assigner Application: Assignments – Properties page will open.

You will see the potential OSEA assigned to the application with a grey arrow against their name.

Ensure that a ☑️ appears in the RGMS Profile? column.

If the RGMS Profile? column displays a ✗, you must remove the OSEA from this application by checking the tick box next to the Properties icon and selecting Delete.

You will then have to re-assign the OSEA to the application by following the steps above, ensuring that you leave the Candidate With RGMS Profile section blank and entering the OSEA’s details in the Candidate Without RGMS Profile fields.
3. Inviting an OSEA

**IMPORTANT NOTE:**
You may assign any number of External Assessors to an application, but there can only be two active (pending/accepted) invitations per application at any given time.

**How to Navigate**

Navigate to the **Assigner Application: Assignments Properties** page as described in section 2.

Click on the **Last Name** of the potential OSEA.

**What it looks like**

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

Hover over the **Properties** tab and select the **Invitation** link.
How to Navigate

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 Lives Overseas? 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]”.

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.

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.

When you are satisfied the Invitation text is as you prefer and the Actions menus 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 OSEA.
4. Cancelling an Invitation to an OSEA

The procedure for cancelling an invitation to an OSEA is the same as the procedure for cancelling an invitation to an External Assessor based at an Australian institution.

To cancel an OSEA invitation, follow the process described in Section 3.2 of Quick Reference Guide Part 3, Sending Invitations to Potential External Assessors.

You can find this Guide on the Assigners Academy page of the NHMRC website.

5. Responding to an Invitation on behalf of an OSEA

OSEAs do not utilise RGMS directly for responding to invitations, and Academy members cannot do this on behalf of an OSEA in RGMS. If an OSEA replies directly to you, DO NOTHING IN RGMS. Please forward any email correspondence to nhmrc.overseasassessments@nhmrc.gov.au.

6. OSEA Conflicts of Interest

OSEAs do not utilise RGMS directly for declaring CoIs, and Academy members cannot do this on behalf of an OSEA in RGMS. If an OSEA replies directly to you, DO NOTHING IN RGMS. Please forward any email correspondence to nhmrc.overseasassessments@nhmrc.gov.au.