



Australian Government

National Health and Medical Research Council

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Research Grants Management System (RGMS)
2018 Assigner Processes Quick Reference Guide
Part 4. Inviting Overseas External Assessors
(OSEA)

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](#) 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.

Email	academy@nhmrc.gov.au
Phone	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:

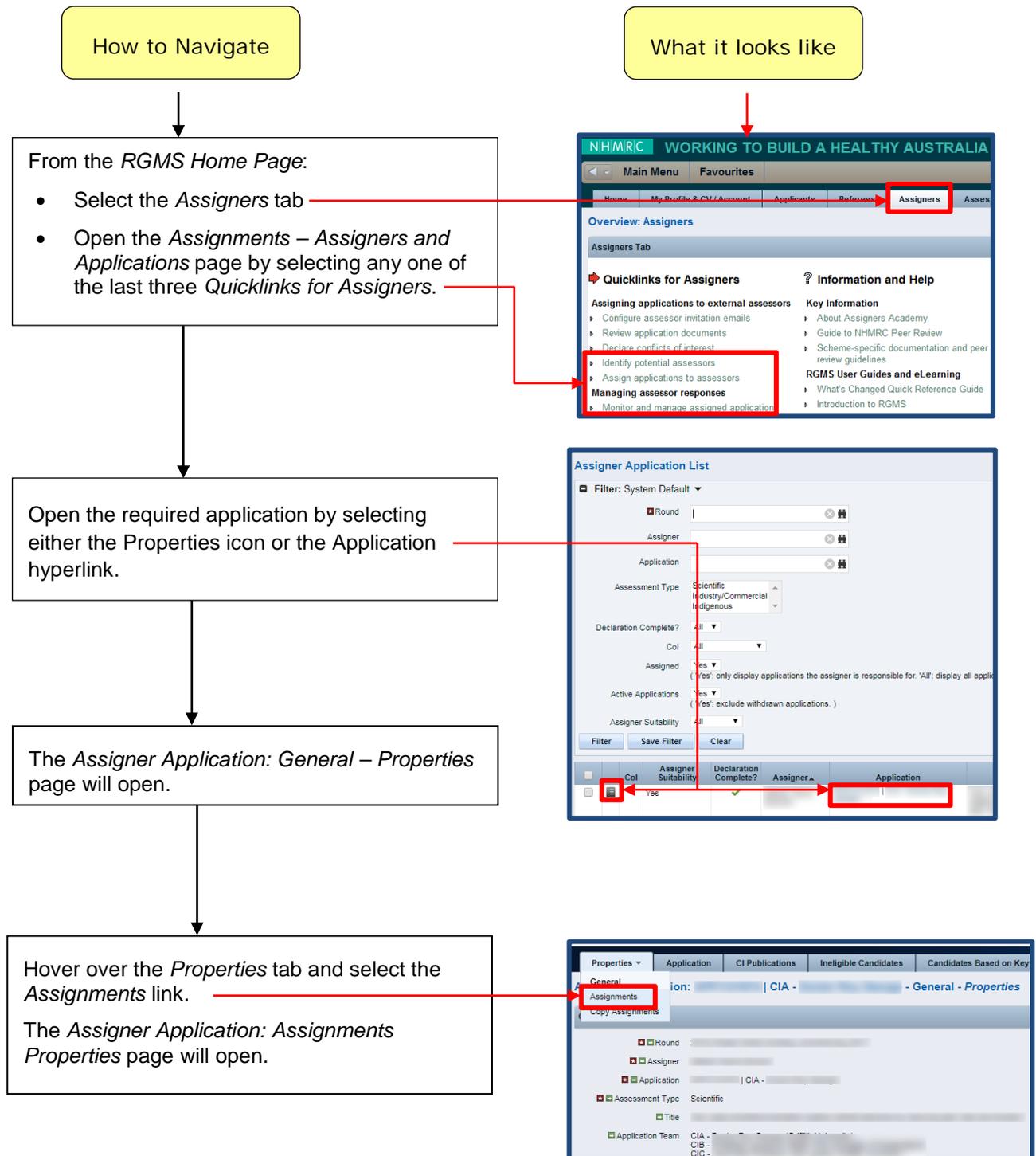
- OSEAS do not utilise RGMS directly for responding to invitations, declaring COIs, or submitting assessments, and Academy members cannot do this on behalf of an OSEA in RGMS. Please forward any email correspondence from OSEAs to nhmrc.overseasassessments@nhmrc.gov.au to assist NHMRC in co-ordinating 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](#) 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

What it looks like

- **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.

The screenshot shows the 'Assignments - Properties' page. At the top, there are tabs for 'Main Menu' and 'Favourites'. Below that, there are several filter tabs: 'Properties', 'Application', 'CI Publications', 'Ineligible Candidates', 'Candidates Based on Keyword Matches', 'Keyword Search', 'Assessments Approaching Overdue', and 'Processes'. The main content area has a 'Filter: System Default' dropdown. Below this is a 'Status' dropdown menu with options: 'New', 'Decision Pending', 'Accepted', and 'Inactive'. The 'Status' dropdown is highlighted in blue. Below the dropdown are buttons for 'Filter', 'Show All', 'Save Filter', and 'Clear'. The main table has columns: 'Info', 'RGMS Profile?', 'Eligible?', 'Status', 'Last Name', 'First Name', 'Title', 'Invitation', and 'Resend Invite'. The 'Status' column contains icons: a yellow arrow for 'Assigned', a yellow arrow for 'Pending', a green arrow for 'Accepted', and a blue arrow for 'Inactive'. There are also red 'X' icons in the 'Status' column. A 'New' button is located at the bottom left of the table. A 'Completed Invitations Cancelled' section is at the bottom right.

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.

Candidate cannot be invited

Indicates OSEA or no RGMS account

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.

How to Navigate

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*.

What it looks like

NHMRC WORKING TO BUILD A HEALTHY AUSTRALIA
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

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.

Properties Application CI Publications Ineligible Candidates Candidates Based on Keyword Matches Keyword Search
Assigner Application: | CIA - Assignments - Properties
Filter: System Default
Status: New, Decision Pending, Accepted, Inactive
Filter Show All Save Filter Clear
Multiple values can be selected by pressing the Shift or Ctrl key while clicking required values
Table:
Columns: Info, RGMS Profile?, Eligible?, Status, Last Name, First Name, Title, Invitation
Row 1:   [Name] [Title] 23/03/17
Row 2:  [Name] [Title] 23/05/16
Row 3:  [Name] [Title] 8/06/16
Row 4:  [Name] [Title] 8/06/16
Row 5:  [Name] [Title] 23/05/16
Summary: Completed: 5, Invitations: 5, Cancelled: 0
Buttons: New, Delete, Return

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.

The *Assigner Application: Assignment Properties* page will open.
Hover over the *Properties* tab and select the *Invitation* link.

What it looks like

Filter	Show All	Save Filter	Clear	Info	RGMS Profile?	Eligible?	Status	Last Name	First Name	Title	Invitation	Resend Invite
					✗	✓	↓				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

Main Menu Favourites

Properties ▾ Processes

General: APP11 | CIA - Professor

Conflict of Interest

Change Last Due Date

Invitation

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**. 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 **X** appears in this box.

Candidate is Eligible? RGMS will not send an invitation if **X** 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* 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.

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.

Filter	Show All	Save Filter	Clear	RGMS Info Profile?	Eligible?	Status	Last Name	First Name	Title	Invitation	Resend Invite
				✓	✓	↓				23/02/17	
				✓	✓	↓				23/02/17	30/04/17
				✓	✓	↓				13/04/17	
				✓	✓	↓				13/04/17	
				✓	✓	↓				26/04/17	30/04/17
				✓	✓	↓				11/05/17	2/06/17
Completed										7	
Invitations											
Cancelled											

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 Cols, 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.

