



Australian Government

National Health and Medical Research Council

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Research Grants Management System (RGMS)
2018 Assigner Processes Quick Reference Guide
Part 5. Monitoring Invitations to Potential
External Assessors

2018 ASSIGNER PROCESSES QUICK REFERENCE GUIDE

PART 5. 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 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 *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.

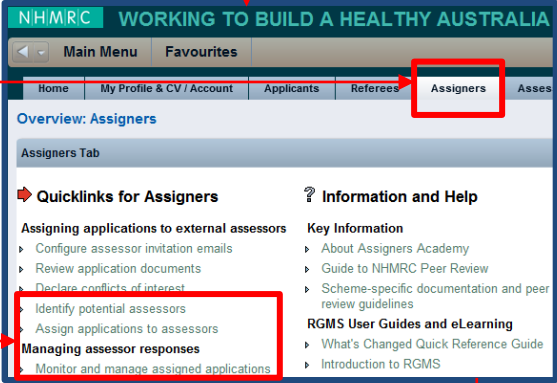
2. Monitoring Progress for Multiple Applications

How to Navigate

What it looks like

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*.



- The *Assignments - Assigners and Applications* page displays applications for which you are responsible.
- These are sorted by application number in the *Applications* column.

Assignments - Assigners and Applications

Filter: None

Round: 2018_Project Grant_funding_comm

Assigner: []

Application: []

Assessment Type: Scientific, Industry/Commercial, Indigenous

Declaration Complete?: All

Col: All

Assigned: All

Active Applications: Yes

Assigner Suitability: All

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
	Yes	✓		[CIA -]		CIA -	0	0	0	0	0	0	0
	Yes	✓		[CIA -]		CIA - CIB - CIC - CID - CIE -	0	0	0	0	0	0	0

How to Navigate

What it looks like

The columns on the centre-right provide a status summary of your assigned applications.

For each application listed, your progress (e.g. the number of external assessors who have accepted invitations and completed assessments) is displayed in columns to the right. These columns are:

- **Invitations** - the number of external assessors you have invited to review an application.
- **Resend** - the number of invitations for an application that were resent after the two-day “no response” period.
- **Accepted** - the number of external assessors who have accepted an invitation to review an application.
- **Completed** - the number of completed assessments lodged in RGMS for an application.
- **Declined** - the number of external assessors who have declined an invitation to review an application.
- **Overdue** - the number of pending external assessments for an application that have passed the due date.
- **Cancelled** - the number of invitations for an application that have been cancelled.

You can sort the data in these columns from high-to-low or low-to-high, as suits your needs, by clicking the title of the column.

For example, you may wish to know how many of your applications have zero accepted invitations.

- Click on the title of the *Accepted* column and RGMS re-sorts the data from low-to-high according to the number of accepted invitations.
- Click on the title of the *Accepted* column again to re-sort the data from high-to-low.

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							

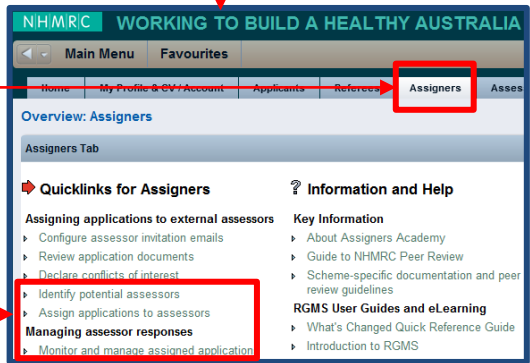
3. Monitoring Progress for a Specific Application

How to Navigate

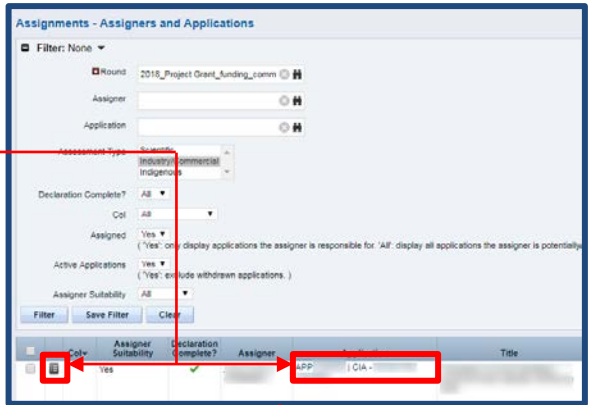
What it looks like

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*

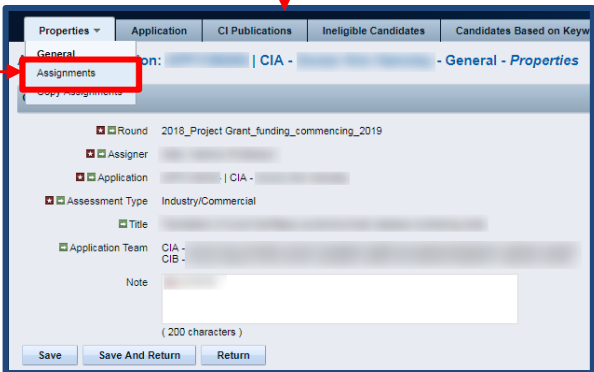


Open the required application by selecting either the *Properties* icon or the *Application* hyperlink.



The *Assigner Application: General – Properties* page will open.

Hover over the *Properties* tab and select the *Assignments* link to open the *Assigner Application: Assignments Properties* page.



How to Navigate

What it looks like

The *Assigner Application: Assignments Properties* page indicates the progress of each External Assessor assigned to that application.

- *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.

Assigned Application: APP1 | CIA - Assignments - Properties

Filter: System Default

Status: New Decision Pending Accepted Inactive

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
	✓	✓	Assigned				23/02/17									*** APP1 Summary.pdf not found. Invitation not sent. Please contact an NHMRC staff member ***
	✓	✓	Pending				23/02/17									
	✓	✓	Accepted				26/04/17	30/04/17			Accepted	10/05/17	20/05/17			
	✓	✓	Inactive				13/04/17				Declined	13/04/17				
	✓	✓	Inactive				13/04/17				Declined	14/04/17				
	✓	✓	Inactive				26/04/17	30/04/17			Declined	30/04/17				
	✓	✓	Inactive				11/05/17	2/06/17			Declined	11/05/17			2/06/17	
Completed													7	1		
Invitations																
Cancelled															1	

Indicates OSEA or no RGMS account

Invitation categories by Date and Status

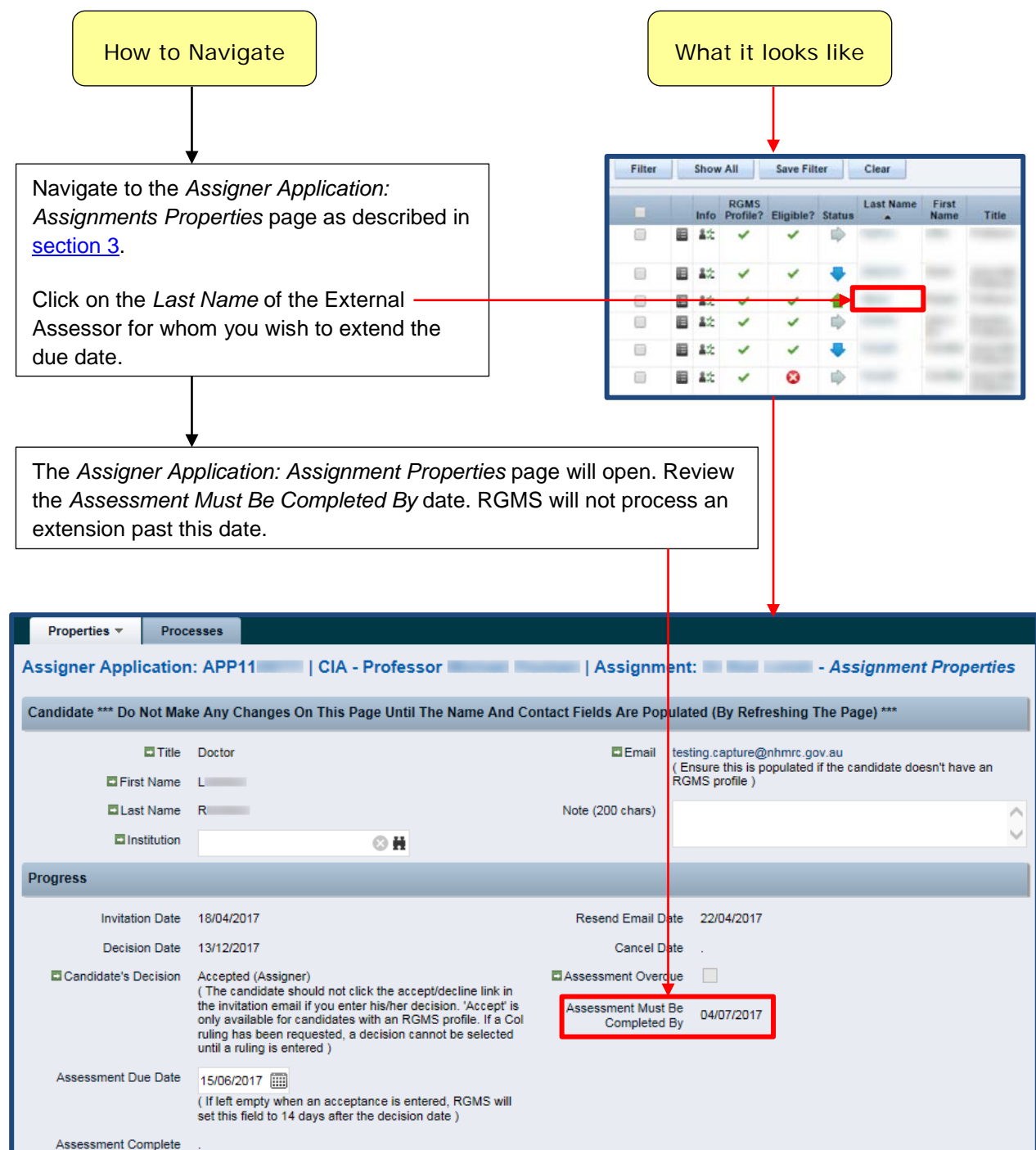
- Assigned** – invitation has not yet been sent.
- Pending** – invitation has been sent, but a decision has not yet been received.
- Accepted** – invitation has been accepted
- Inactive** – invitation has been declined or cancelled.

4. Extending the Due Date for External Assessments

External assessors are initially asked to complete their assessment within 14 calendar days from the date they accept the invitation. However, an Academy member may extend the due date if required.

IMPORTANT NOTE:

The due date for an assessment cannot be extended past the **Assessment Must Be Completed By** date. See below for further details.



How to Navigate

What it looks like

Select the *Calendar* icon. A *Calendar* appears in a pop-up window. Click on the appropriate date and press *Save and Return*.

The screenshot displays the 'Assignment Properties' page. The 'Assessment Due Date' field is set to 15/06/2017. A calendar pop-up is open, showing the month of June 2017. The date 30 is selected. A red box highlights the 'Save And Return' button at the bottom of the calendar. Other fields include 'Candidate's Decision' (Accepted), 'Assessment Overdue' (checkbox), and 'Assessment Must Be Completed By' (04/07/2016).

