



## RNID GRANT MANAGEMENT SYSTEM USER GUIDE

The purpose of this document is to provide practical information on how to use the RNID grant management system (Flexi-Grant) to apply for, and manage your grants, act as a co-applicant or the administrative authority for an application. You can scroll or click on the page number in the table of contents below to access the relevant document sections.

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If you have any queries that are not answered by these guidance notes, or if you are experiencing technical difficulties, please get in touch with the RNID grants team at [research@rnid.org.uk](mailto:research@rnid.org.uk)

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## Registration and Login

You must have registered an account with RNID's Flexi-Grant to apply for and participate in an application and to manage your grant.

### New users

To register go to <https://rnid.flexigrant.com/> and click on the 'register' button (fig 1). You will then be asked to read and consent to our Data Protection and Privacy Policy. Complete the registration form which follows. A confirmation email will be sent to your email address; please click the provided link in the email to activate your user account. This will confirm your email address and complete your registration.

We strongly recommend that you use your institutional email address to register your account.

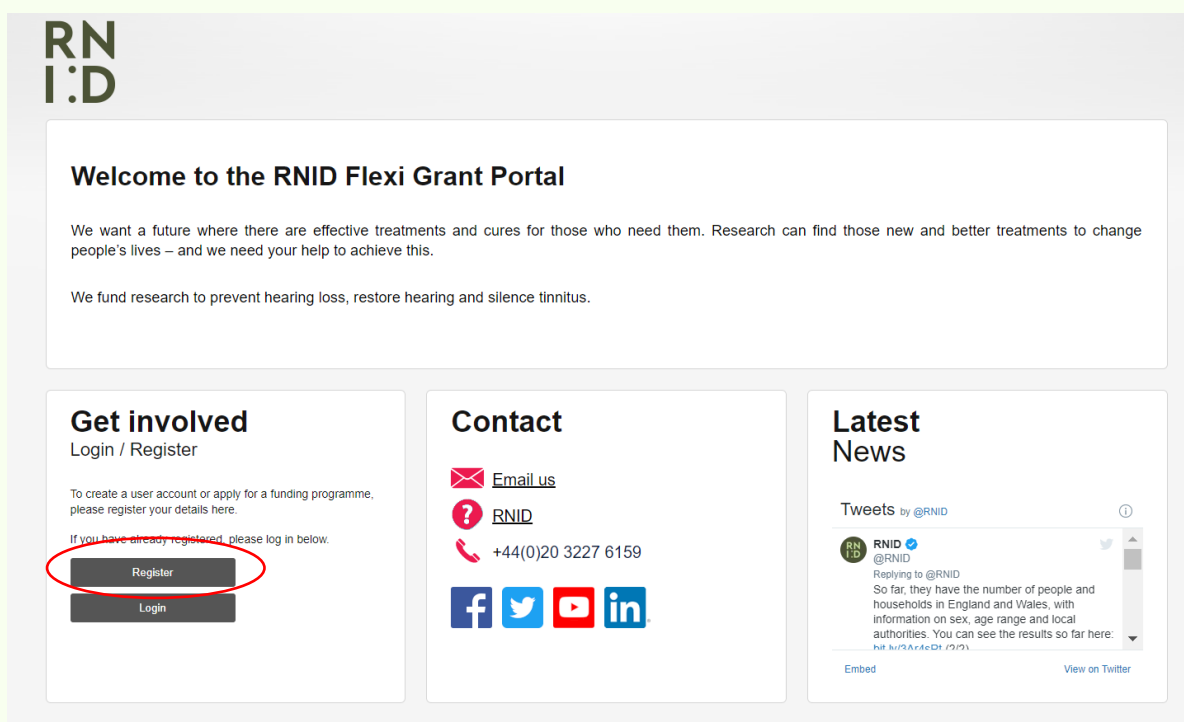


Figure 1. RNID Flexi Grant Portal

### Current grant holders / Panel member login

If you are a current RNID grant-holder or a member of one of our review panels, we have created an account for you. You will receive an automated email; click on the enclosed link to be directed to Flexi-Grant where you should reset your password as directed. You will then be able to log in to your account. If this is the first time you are logging in, you will be asked to read and consent to our Data Protection and Privacy Policy.

## Forgotten passwords and locked accounts

If you have forgotten your password, click on the 'Forgot password?' link to reset it on the login page. You will then receive an email with instructions on how to reset your password.

If you enter your password incorrectly 3 or more times, your account will be locked; this is to protect you from any attempts by a third party to access your data. To unlock your account, please contact us at [research@rnid.org.uk](mailto:research@rnid.org.uk)

## Managing your account details.

The portal home page is the starting point for creating and accessing applications, managing your user account, accepting review assignments and changing your password. Please select the 'My account' option which will take you to the main page of your account.

We will use the details which you have provided when first registering your account, as your contact details. Please update and complete your personal details by clicking the 'My contact details' button on the portal homepage (Fig 2). The 'Contact details', 'Area(s) of Expertise' and 'Organisation details' on the page can be expanded/contracted by clicking on the relevant section.

Select your organisation from our drop-down menu in the relevant section. If your organisation is not on the list, please contact us on [research@rnid.org.uk](mailto:research@rnid.org.uk) You should also add your areas of expertise and your ORCID ID, if relevant.

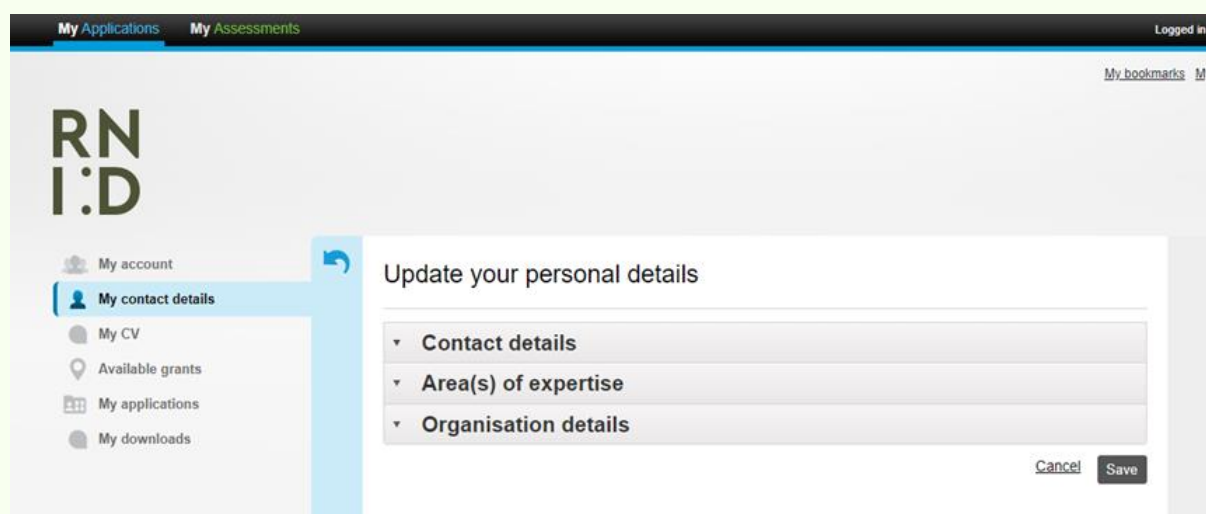


Figure 2. Updating your personal details

You should also update your CV information, found by clicking on the 'My CV' button in the menu on the left-hand side of your 'My Account' page. You will be required to

submit a CV to support any grant application you make (this applies to all applicants and co-applicants), so we encourage you to keep it up to date. Once you have completed this section, it will be included in each application you submit (so you will only have to complete it once and then update it when needed).

## Guidance for applicants

### Application contact details

When you start an application, you will automatically become the lead applicant. The lead applicant will be the only one that can submit the application and will be the sole point of contact for the duration of the application (and award if successful). All emails including notification of application results, will only be sent to this account holder.

### Application process

To see which grant schemes are open at any one time and to start an application please select the 'Available grants' option in the main menu, in your account.

To continue completing any active applications select the 'My applications' option in the menu. Here you will also be able to see the status of submitted applications.

After selecting one of our funding schemes, you will be taken to a page which outlines some guiding principles and general eligibility criteria which you will need to read before you can proceed.

### Summary Page

The summary page gives you an overview of your application form, your progress in completing the form and obtaining input from other participants (i.e., co-applicants and administrative authority – details are in the 'Inviting participants' section below). See figure 3 on the following page for an example of what the summary page looks like.

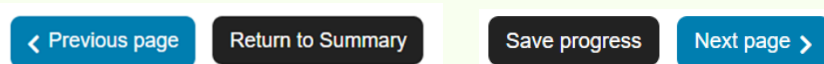
Please make sure to read the instructions on each of the different pages in the application carefully as these will contain scheme specific information and links for extra guidance.

Number	Page	Est. time to complete	Status	Required documents
1	Lead Applicant Information		Not Started	Start
2	Collaborators		Not Started	0 / 1 Start
3	Project Details		Not Started	0 / 1 Start
4	Funding Requested		Not Started	Start
5	Other Support and Submissions		Not Started	Start
6	Use of Animals in Research		Not Started	0 / 1 Start
7	Use of Human Patients and Tissue		Not Started	Start
8	Declaration		Not Started	Start
9	Administrative Authority Declaration		Not Started	Invite Administrative Authority

Figure 3. Example Summary Page

### Completing your application

You can save your work and return to it later, at any stage in the application process. The questions and sections can be completed in any order. When you leave a page by clicking any of the following buttons, any edits you have made will be saved automatically:



However, if you click any of the other buttons in Flexi-Grant or the back button in your internet browser without saving, new content and edits will not be saved. The application will also time out after prolonged periods of inactivity; using the 'Save progress' feature is highly recommended.

All questions marked with a red asterisk (\*) are mandatory; you will receive a warning prompt if you have not completed these before moving on to the next page, and you will be prevented from submitting your form if you do not complete them. If you encounter a mandatory text question that is not applicable to you/your project, please enter 'n/a' or 'not applicable' in the response field.

Many of the open text questions have word limits. We suggest that you work offline for sections with large word limits, then copy and paste your text into the box. **You will**

**not be able to insert more text than the set word limit and any text in excess of this will not be included.**

#### Incomplete questions and error messages

It is not possible to submit an incomplete application. The summary page indicates which section of the application is incomplete or contains an error. If you are unable to identify what information is missing, once on the relevant page, click the 'Save progress' button at the top or bottom of the page. This will prompt a pop-up highlighting which sections are incomplete/contain an error.

#### Two stage scheme applications (Discovery Research grant / Translational grant)

Some of our grant schemes have a two-stage application process. If your Stage 1 application is successful, you will receive a unique link in your notification email which will allow you to begin your Stage 2 application. You will not be able to start a Stage 2 application directly through Flexi-Grant – you must use the link in the email and ensure you login as the original account holder. Once you have followed this link, your Stage 1 application (EIO/Preliminary application) will be marked as complete, and your Stage 2 application (Full application) will appear under 'My applications'

#### Inviting participants

To add participants to your application, click the 'Participants' tab on the summary page (fig 4). Inviting co-applicants to participate in your application is optional, however, **all applications must be approved by the administrative authority for the host institution before being submitted** (Co-applicants will need to create an account to participate in the application, however the administrative authority will be able to do approve an application using a 'guest login' and will not be required to create an account.

Participants will be notified by email of your request and must accept their role before accessing the application. They will need to update their C.V. details if prompted (co-applicants only) and complete the relevant participant section of the application form. You can track the status of these sections on the summary page and will only be able to submit your application once these have been completed. You will receive an email confirmation when a participant has completed their contribution and the status will be updated to; 'Complete'.

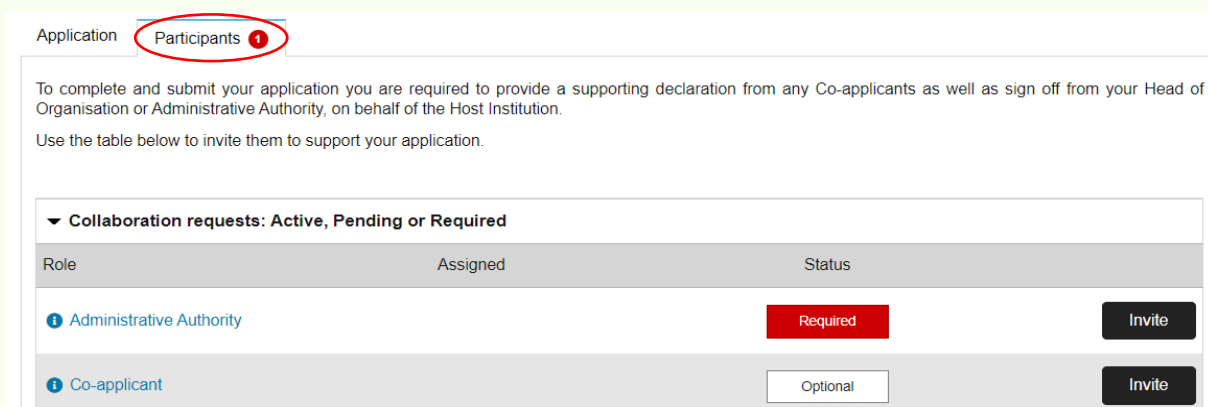


Figure 4. Summary Page – Participants Tab

Once all pages of the application are complete and all participants have completed their input the 'Submit application' button should be visible and will no longer be greyed out (you can verify all sections are complete by looking at the status of each page in your summary page, see fig 2.). Press the button to submit your application; you will receive an automated email confirming that we have received your application. **You will not be able to make any changes to your application once you have submitted it, so make sure all information is correct before submitting.**

## Guidance for participants

### Co-applicants

If you are invited to participate in an application by the lead applicant, **click on the link in the invitation email**, and you will be taken to the Collaboration request page (your role will be marked as – 'Co-applicant'). You will then be able to accept or decline the invitation (see fig 5). If you already have an account, log in as normal, if not you will be asked to register an account. Please see the registration and login guidance on page 1 of this document.

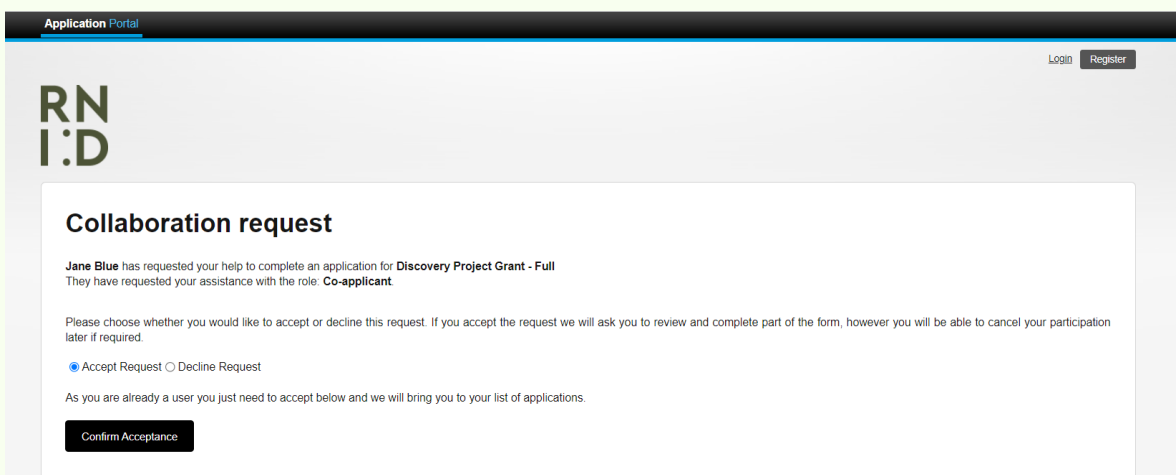


Figure 5. Collaboration request page

You must submit CV information for any grant application you make or participate in, and you will not be able to submit your contribution without having completed this section. You can access it by clicking on the 'My CV' button in the menu on the left-hand side of the page located in your account. Once updated the information will be transferred to all the applications you take part in/submit in the future.

Once you have completed/confirmed your CV information, click the save button. You will then be asked to agree to the relevant applicant declaration and confirm your participation in the application. To submit, please click the 'Finish contribution' button.

## Administrative authority

You will be invited to participate in an application by the Lead applicant. **Click on the link in the invitation email**, and you will be taken to the Collaboration request page (your role will be marked as – 'Administrative Authority'). You will then be able to accept or decline the invitation (see fig. 5 in above section). You will be able to log in as a guest without having to create an account.

## Guidance for grant holders

### Reporting on your grant

We will send you email requests to submit finance and research progress reports. Please follow the link in the email to log into your account and select the 'My Applications' tab at the top of the page (fig 6.1). Click on the 'Reporting' button in the awards section to access.

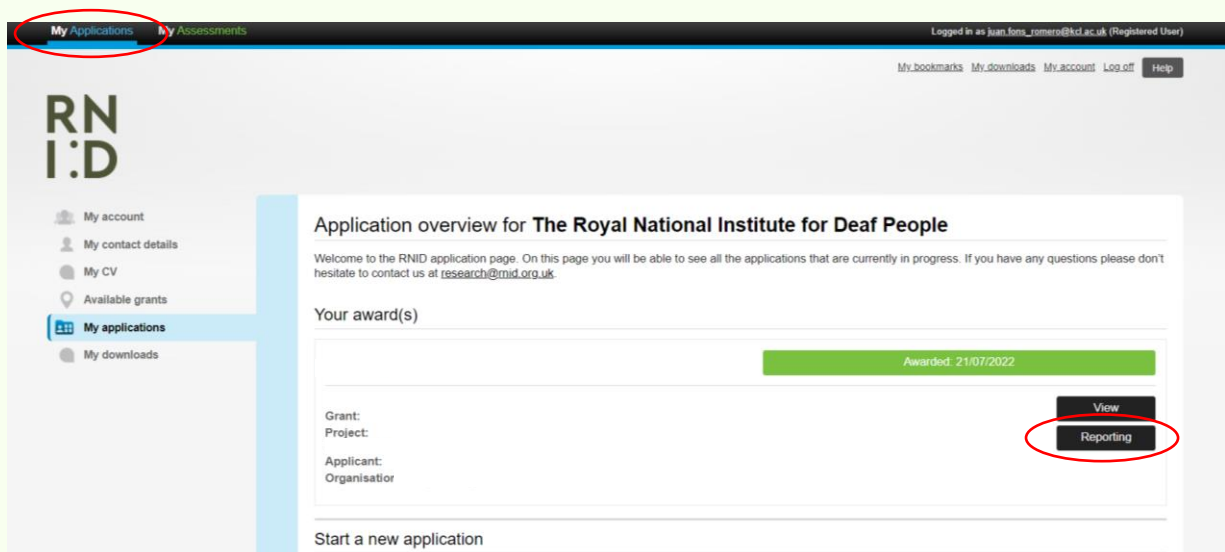


Figure 6.1. Submitting annual reports.



You will see details of all your current and submitted reports in this section (fig 6.2). Please click on the ellipsis next to the relevant report and select the 'Complete Form' option.

As part of the finance report requirements, you will be asked to download a report template to pass on to the relevant person at your institution to complete. A completed copy must be uploaded as part of your report as instructed.

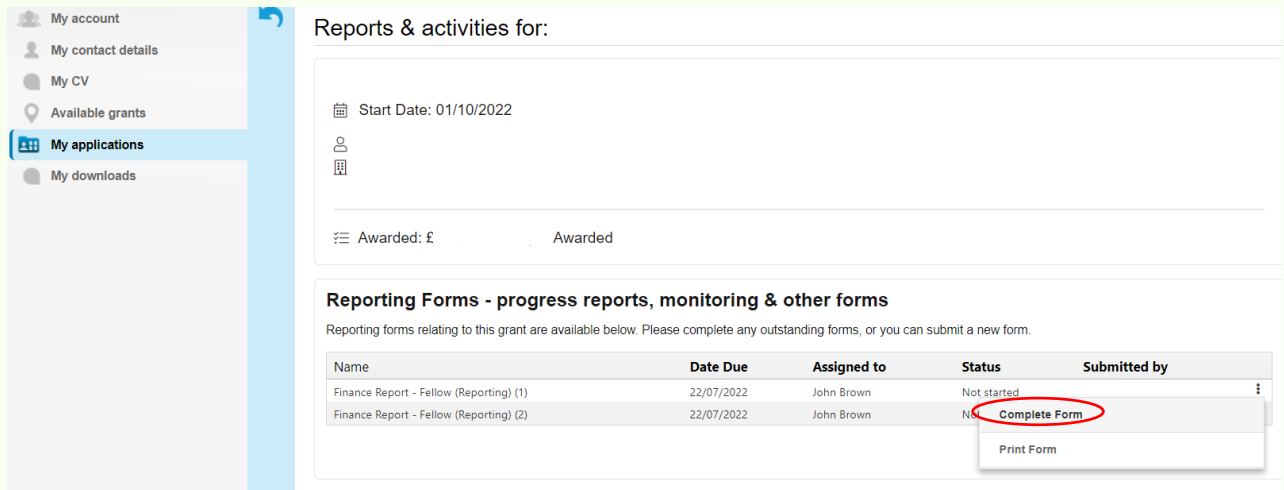


Figure 6.2. Submitting annual reports.

After completing all of the relevant sections in the report please save and then click the 'Submit Form' button at the top of the page to submit.

## No-cost extensions & other changes to your grant

To request a no-cost extension or budget reallocation on your grant, please click on the 'New Form' button to access (fig 7.1)

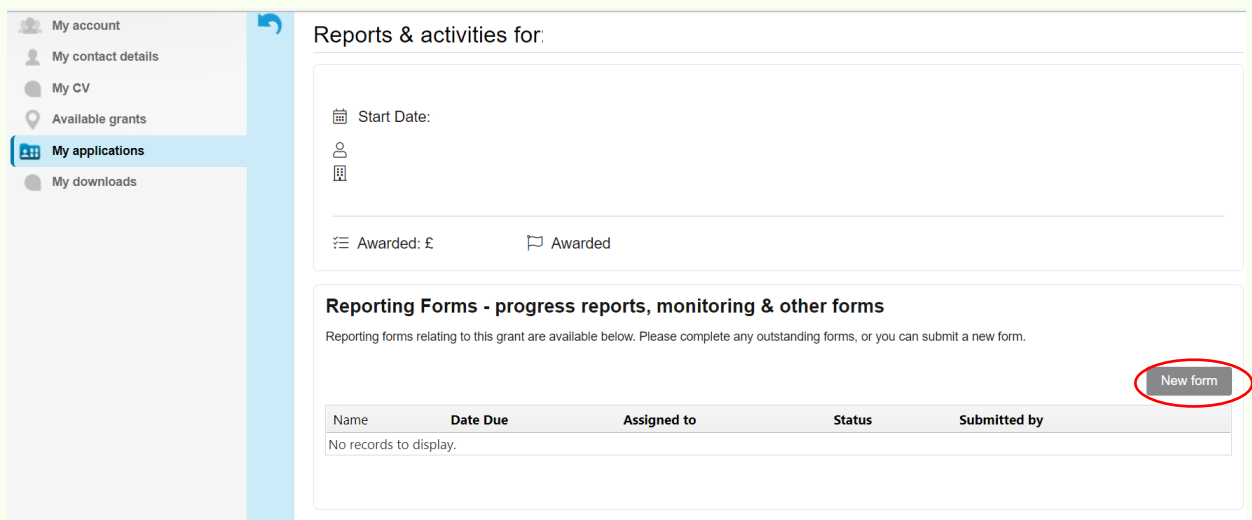


Figure 7.1. Accessing a 'Change request' form

You will then be able to select a 'Change request' report form from the dropdown menu to complete and submit.

Please email us at [research@rnid.org.uk](mailto:research@rnid.org.uk) if you have any questions.