Grant Tracker User Guide

1. About this document

This document describes how to register as a user of Breast Cancer Now Grants Online system, and how to use it to apply for a grant.

2. Registration

Welcome to our online grant application system.
- To submit a grant application, please login (or register) below.
- To contact the Research Grants Administration team, please click here.

[Important note] - Please allow your finance office at least one working day to approve your application once it has been submitted.

Note: the system URL has now changed to grants.breastcancernow.org. Please update any bookmarks.

Existing users
Please log in to access your account.

Email

Password

New users
Please register with us to create your account using your email address. This email address will be used for all correspondence so please ensure that the address is valid and regularly checked.

Please note that all new users require validation prior to receiving access to the system. We will endeavor to complete this validation process as soon as possible (up to 1 business day) following completion of your initial registration.

Register
System Help

2.1 For applicants new to our online applications system

Only registered users of the system can apply for grants. Please click Register and follow the on-screen instructions to complete the registration process.

You may find the following notes useful:

- You will use the same email address that you registered with to identify yourself when logging in.
- The system will use this email address for all correspondence. It is therefore recommended to choose an email address you use regularly.
- Once your registration request has been approved, an email confirming the registration will be sent to you and you will be able to log in for the first time.
- If your email address changes in the future, please update your details including your new email address.
- If you are a grant holder or if you have previously contributed to an application or review, your email address may already be registered. The system will detect this automatically and will invite you to log in without needing to re-register.
- The system allows you to store answers to security questions to assist the secure retrieval of your password if you ever forget it.

2.2 Forgotten password

If you forget your password, click the ‘Forgotten Password?’ link on the ‘Registration’ and ‘Login Page’, and ask for a replacement password to be sent to you by email. This replacement password gives temporary access to the system, during which time you will be asked to provide a new, permanent password.

2.3 Account lock out

Persistent use of an incorrect password will lock your account; this is to protect you from attempts to access your data by a third party. If this happens you can request a new password via the ‘Forgotten password’ function.

3. Starting a grant application.

The home page is your starting point to create applications or to update your details, including your academic CV. It is also where you as a grant holder can manage your grants, and as a reviewer can participate in the review process.
3.1 Creating and completing a grant application

3.1.1 An overview of the creation and preparation of a grant application
1. The Lead Applicant must be person creating the application, which can be jointly completed with any of the co-applicants.
2. Co-applicants may be added to the application. When a co-applicant is added, Breast Cancer Now Grants Online will automatically email them to invite their participation. Co-applicants can decide whether to confirm participation and approve the proposal. These steps are required for the lead applicant to validate the application form and submit.
3. Applicants and co-applicants can manage their CVs in ‘My Details’. The CVs are automatically included in the application submission.
4. The Head of Department must be added to the application. The Head of Department will receive an email to confirm participation and approve the proposal. These steps are required for the lead applicant to validate the application form and submit.
5. A Finance Officer must be added to the application to sign off the application. The Finance Officer will receive an email to confirm participation. This step is required for the lead applicant to validate the application form and submit.
6. When the application form is complete it must be validated prior to submission for approval by the Finance Officer. This will highlight any omissions in the form, and allow these omissions to be corrected.
7. When a grant application is submitted for approval, an email is sent to the Finance Officer informing that his/her approval is requested. The Lead Applicant may follow the progress of the approval process on the grant summary page.
8. When the Finance Officer has approved the grant application, it will be fully submitted to Breast Cancer Now. Following an eligibility check, the application will enter into a peer review process if deemed suitable.

3.2 Creating a grant application

You can create a new grant application from the link on the home page, or by clicking 

The new applications page is opened by clicking the link under ‘New Application’ on the home page, or from the ‘My applications’ screen.
The grant rounds currently open are listed and the "More info" link returns a description of the grant round.

To create a new grant application, click “Apply” beside the type of grant you wish to apply for.

<table>
<thead>
<tr>
<th>Grant Type</th>
<th>Funding Round</th>
<th>Closing Date</th>
<th>More info</th>
<th>Apply</th>
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<td>30 April 2017 4:00PM</td>
<td></td>
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</tbody>
</table>
3.3 Completing a grant application

To submit a grant application, all the sections of the online application form listed as a menu down the left-hand side of the screen must be completed and validated.

- In order to complete your grant application form correctly, please refer to the guidance notes provided on our website.
- You can move from page to page using the buttons, or using the menu on the left-hand side.
- Remember to save your application by clicking You will be prompted to save your work if you leave the screen but it is always good practice to save work often in case of technical issues.
- You can save and return to the application form as often as you wish.
- The system will prevent your co-applicants accessing your application at the same time as you. This is to stop applicants and co-applicants inadvertently making changes to the same part of the application at the same time and overwriting each other’s work.
4. Managing your application

To manage an application select your application in the ‘My Applications’ page.

The boxes on the right enable you to:

- **Edit** the application on return visits
- **View the application** as a PDF. This creates a form with your latest edits for you to review or to create a paper copy. The watermark is cleared after a successful submission.
- **Validate** that your application is complete for submission.
- **Submit the application** for approval – this button is only available when validation has been successfully completed.
- **Delete the application** if you wish to. **Note that this is an irreversible action**; the application cannot be recovered after deletion.

The menu items on the left:
• **Change history** – shows the changes made to the application form, this can be useful for the review of changes made by collaborators.
• **Journal** - is a notepad function allowing collaborators to leave messages and/or attachments.
• **Sign-off status** - reports on the progress of the sign-off process by each of the signatories.

5. **Submitting your application**

   • After successful validation, the lead applicant may [Submit] the application. It will then be routed to Finance signatory for their approval.
   • If a signatory rejects the application, the lead applicant will be notified along with any feedback that the signatory has supplied.
   • The application can then be re-submitted; it will be returned to the signatory who made the rejection and continues through the approval process as before.
   • On completion of the final approval:
     - A grant application number is assigned to the application.
     - The application will be checked for eligibility and enters Breast Cancer Now’s peer review process if deemed suitable.

6. **Contact us**

   If your query is not answered in these notes you may email us by selecting the **Contact Us** link available on the portal or email [grants_admin@breastcancernow.org](mailto:grants_admin@breastcancernow.org) directly. Additionally, if you are experiencing any technical problems please use the same link. We will endeavor to answer all queries within 2 working days.