INTERNAL USER GUIDE

A Guide to the National Institute for Health Research Central Commissioning Facility Research Management System (Grant Tracker)

A Quick Guide for applicants applying for funding from the NIHR CCF
NIHR CCF web page: http://www.ccf.nihr.ac.uk/Pages/Home.aspx
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Important Notice</td>
<td>3</td>
</tr>
<tr>
<td>B Introduction</td>
<td>3</td>
</tr>
<tr>
<td>C How to Register using Grant Tracker</td>
<td>4</td>
</tr>
<tr>
<td>D How to Complete your application using Grant Tracker</td>
<td>5</td>
</tr>
<tr>
<td>E How to Submit your application using Grant Tracker</td>
<td>7</td>
</tr>
<tr>
<td>F Helpdesk</td>
<td>10</td>
</tr>
</tbody>
</table>

### Appendix I

<table>
<thead>
<tr>
<th>A flowchart overview of the Grant Tracker Submission process for the NIHR Central Commissioning Facility</th>
<th>11</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
A  IMPORTANT NOTICE

The National Institute for Health Research have two main research programmes co-ordinated and managed by two different entities:

1) NIHR Central Commissioning Facility (CCF)
2) NIHR Evaluation, Trials and Studies Coordinating Centre (NETSCC)

This guide is only concerned with grant applications relating to the NIHR CCF. There is a separate guide that deals with applying for research programmes co-ordinated and managed by the NIHR NETSCC.

B  INTRODUCTION

1. The Central Commissioning Facility (CCF) manages the following NIHR research programmes:

   i) Programme Grants for Applied Research (PGfAR)
   ii) Programme Development Grants
   iii) Research for Patient Benefit (RfPB)
   iv) Invention for Innovation (i4i)

The CCF’S Research Management System (Grant Tracker) enables applicants to apply for research funding online. The homepage to the CCF is http://www.ccf.nihr.ac.uk/Pages/Home.aspx

The available 4 grant schemes can be accessed from here (as can be seen in the screen shot below)
2. You will not be able to use the system unless you have a **username** and **password**

- If you do not have an account, go to **Section B** (How to register)
- If you do have an account, go to **Section C** (How to complete and submit an application)

## C How to Register using Grant Tracker?

1. Go to the Grant Tracker log in page: [https://ccfrms.nihr.ac.uk/Login.aspx](https://ccfrms.nihr.ac.uk/Login.aspx) where the following screen will appear:

   - Click on **Register** (as shown above) and then follow the onscreen instructions
   - Enter your College email address then confirm your email address in the fields as shown. Click on Next to continue.

   - This is the email address that will be used for all correspondence and which you will use for future access to the system. You will be able to change this in the future if required.
   - If you are a grant holder, or have contributed to an application or review, your details may have been pre-registered for you.
In this case a message will inform you that an account exists for the email address you have supplied. If this is correct you must accept the Terms and Conditions before proceeding.

- If you are a new user, complete the registration form that follows. Mandatory fields are marked with a red dot. Once finished check the box that confirms that you accept the terms & conditions and then press on the submit button.

Once completed, an email will be sent to the email address that you have registered. This verifies your email address and provides a unique initial password and a link to follow. Once you have accessed the system you can change details and choose a new password.

N.B. When you enter your email address and password enter them directly and do not cut and paste this information. Remember the password is case sensitive.

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<table>
<thead>
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<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>D</strong></td>
<td><strong>How to Complete your Application using Grant Tracker</strong></td>
</tr>
</tbody>
</table>

1. Once registered log into Grant Tracker at [https://ccfrms.nihr.ac.uk/Login.aspx](https://ccfrms.nihr.ac.uk/Login.aspx) and enter your username and password. This will take you to the Home screen of Grant Tracker.

   **N.B.** The home screen is your starting point to managing your grant applications. A wide variety of tasks is available here such as the ability to update your personal details, participate in an application as a reviewer, as well as detailed guidance notes helping you complete your grant applications.

2. Once you have successfully logged onto Grant Tracker:

   - Click on the here link in the ‘New Grant Application’ section in order to bring up a list of all of the available grant opportunities.
3. Scroll down the page to find the scheme you wish to apply for. Select the scheme by clicking on Apply button. The More info link returns more information about the grant.

4. Different schemes will have different project specific fields to complete. You must complete ALL sections before submission.
1. The sections of the application form are listed as a menu down the left-hand side of the screen. **You must complete all of these sections.**

- You can either complete your application in sequence or choose the section you want to complete from the left hand Navigation menu. Depending on the Grant you are applying for you may see more or less items in the menu.
- **Co-applicants** must individually accept their inclusion (they need to be registered with CCF Grant Tracker)
- If you are asked to provide a Finance/Research Officer then please enter the name **Cindy Lai** and ensure that her associated email address is **RGCOADMIN@IMPERIAL.AC.UK**
- The system will prevent you and other applications accessing your application form at the same time.

2. You may move from page to page using the previous and next buttons or jump through the form using the menu on the left hand side.

3. **System Help** and **Applicant Guidance** is available should you need further assistance in completing your application.

4. You can get further help on specific fields by double clicking on the question mark symbol wherever it appears 🚦

5. **Remember to save your work every time you exit.** You can save your work as many times as you wish until it has been submitted. This system will **not** automatically save your application form.

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**E**

How to Submit your Application using Grant Tracker

**N.B.**

After you have completed the form the next step is to submit. The CCF Grant Tracker system does not replace our current internal authorisation process. Please remember that an InfoEd proposal must be completed and fully approved before a Grant Tracker application can be authorised by Research Services.

1. After logging into the home screen [https://ccfrms.nihr.ac.uk/Login.aspx](https://ccfrms.nihr.ac.uk/Login.aspx) click on **My Applications** which will bring up a list of your current applications
2. Then select the correct application that you wish to apply for by pressing the ‘Update Details’ symbol on its right hand side ( ).

3. The following screen will appear:

The boxes on the right-hand side of this screen enable you to:

1. Edit the application on return visits
2. **View** the application as a PDF. This creates a paper copy which can be printed.

3. **Validate** your application for submission. When you are happy with your application press here and you will be directed into your application, where you will have to validate one more time before you can submit.

4. **Submit** your application form for approval – this button is only enabled once the validation has been successfully completed.

5. **Delete** the application if you wish to, but please note that **this is a final action**.

Menu items on the left-hand side of this screen:

6. **View history** – shows the changes made to the application form, this can be useful for the review of changes made by participants (e.g. a co-applicant).

7. **Journal** is a notepad function allowing participants to leave messages and/or attachments.

8. **Sign-off Status** reports on the progress of the sign-off process by each of the signatories.

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**4.**

1. **After** successful **validation** the Lead Applicant may **submit** the application to the CCF (refer above to points 3& 4 under Section E step 3)

2. A system generated email will be sent to the signatories (in turn where there is more than one) informing them that their approval is required. The lead applicant can follow the progress of the application on the ‘Application Summary Page’ (see step 5 below).

3. If a signatory (usually Research Services) rejects the application the Lead Applicant is notified with any feedback the signatory supplies. The application can then be re-submitted.

4. On completion of the ‘Final Approval’ the application is submitted. A confirmation email is sent to the Lead Applicant and an application reference number is issued.

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**5.**

The Status of an application can be followed on the ‘My Applications’ section of Grant Tracker.

<table>
<thead>
<tr>
<th>Reference</th>
<th>Title</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
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<tbody>
<tr>
<td>4205</td>
<td>Visiting Professorship</td>
<td>06/05/2010 10:09:59</td>
<td>Pre-Submission</td>
</tr>
</tbody>
</table>

The Status of an application will be one of the following at any one time:

(i) **Pre-Submission** - You are yet to submit the application for signatory approval and can edit
(ii) **Awaiting Signatory Approval** - You have submitted your application for signatory approval
(iii) **Modifying** - A signatory has rejected your application for modifications to be made
(iv) **Submitted** - Your application has been signed off by signatories and submitted to the CCF.
1. You can obtain further help from (i) the Contact Us link (ii) the System Help PDF and (iii) the Question Mark Symbols within Grant Tracker.
APPENDIX I
National Institute for Health Research CCF Grant Tracker Application Submission Process
A Flowchart Overview

NIHR Central Commissioning Facility Grant Tracker Submission Flowchart

Application Created by Lead Applicant

Lead Applicant adds signatories and any co-apps, advisors etc

N.B. Signatories may include 1) Department Head (you may select Cindy Lai) and 2) Finance Officer (always select Cindy Lai)

Signatories, co-apps, advisors etc, must log in and confirm involvement

Applicant finishes entering data

Co-Apps (if any exist!) must log in and approve the application

N.B. Your Research Services team will approve the application as the Finance Officer

Lead Applicant can now submit the application

After the application is submitted automated emails are sent to advise the signatories

Signatories must log in and approve the application

Application is submitted to the Central Commissioning Facility (CCF)

Confirmation email is sent to the applicant