INTERNAL USER GUIDE

A Guide to the Wellcome Trust
Grant Application & Management System (WT Grant Tracker®)

A Quick Guide for Applicants applying for funding from the Wellcome Trust
Wellcome Trust Grant Tracker® UK web page: https://wtgrants.wellcome.ac.uk
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## Appendix

A flow chart overview of the Wellcome Trust Grant Tracker Submission Process  11
**A  INTRODUCTION**

1. The Wellcome Trust’s Grant Application & Management System enables applicants to apply for research funding online.

   ![](image-url)

   A list of available grant schemes can be found on the Wellcome Trust’s website using the following link:

   [http://www.wellcome.ac.uk/Funding/index.htm](http://www.wellcome.ac.uk/Funding/index.htm)

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)
B  How to Register using Grant Tracker

1. Go to the Grant Tracker log in page: https://wtgrants.wellcome.ac.uk where the following screen will appear:

   ![Grant Tracker login screen]

2. 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.

   ![Register prompt]

   - 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 previously had an eGRANTS account, are a Committee Member or have been a Peer Reviewer, your details may have been pre-registered on the system.

   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 trust’s 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.

## How to Complete your Application using Grant Tracker

1. Once registered log into Grant Tracker [https://wtgrants.wellcome.ac.uk](https://wtgrants.wellcome.ac.uk) 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 create applications, update your details (including applicant’s CV’s). This is also your starting point as a grant holder to managing your grants and (if relevant) as a reviewer to participate in the refereeing process.

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.
• If you selected Apply then a dialogue box such as the one shown may appear (this is dependent on the grant scheme you are applying for though). There are usually two tabs:

1) **Scheme guidance** – allows you to access further information about the funding opportunity
2) **System guidance** – provides you with some basic system help

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 (see Appendix)

- Under the Delegation and approval section you will be asked if you want to: A) Add delegate... - If desired the PI can assign read & write access to a delegate for assistance. Please note the delegate (i) will need to register with WT Grant Tracker and (ii) cannot submit the application B) Send Notification - Your application will need to be approved by your faculty's JRO/Research Services team. You must send them a notification that an application is in progress. Please press this button if you intend to submit your application even if you haven’t finished it.
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<td><strong>2.</strong></td>
<td>There are question mark buttons scattered throughout most of the compulsory questions. These provide useful guidance in how to answer that particular question.</td>
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<td><strong>3.</strong></td>
<td>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.</td>
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<tr>
<td><strong>4.</strong></td>
<td>Remember to save your work. You will be prompted to save your work if you leave the screen. 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.</td>
</tr>
<tr>
<td><strong>5.</strong></td>
<td>When you have finished your session you should press on the Save and Close button.</td>
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<td><strong>6.</strong></td>
<td>You can build a PDF of your application thus far by pressing the Application PDF button. This can be useful if you need to re-read what you have written when you don’t have internet access, or, share your application with another party who you don’t want to delegate full read &amp; access to.</td>
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**D How to Submit your Application using Grant Tracker**

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<tr>
<td><strong>N.B.</strong></td>
<td>After you have completed the form the next step is to submit. The Wellcome Trust 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.</td>
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<td><strong>1.</strong></td>
<td>On the home screen <a href="https://wtgrants.wellcome.ac.uk/Index.aspx">https://wtgrants.wellcome.ac.uk/Index.aspx</a> click on My Applications which will bring up a list of your current applications.</td>
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<td>Then select the correct application that you wish to apply for by pressing the ‘Update Details’ symbol on its right hand side ( )</td>
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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/Print the application as a PDF. This creates a form with your latest edits, which you can view or print. The watermark is cleared after a successful submission.
3. Validate your application for submission. When you are happy with your application you press here which will then send you into your application where you will have to validate once more before you can submit.
4. **Submit** your application form for approval – this button is only enabled once the validation after successful validation. You cannot edit the form after submission. Please note, not all forms require approval.

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. collaborators).

7. **Journal** is a notepad function allowing participants to leave messages and/or attachments for each other. Please note that these are not included in the submitted application form.

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

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4.

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

2. A system generated email will be sent to the Authorised Organisational Approver (JRO/Research Services) informing them that their approval is required. The lead applicant can follow the progress of the application on the ‘Application Summary Page’ (see section 5 below).

3. If the Authorised Organisational Approver 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.

5.

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

![Status of Application](image)

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 (you are not able to edit your form at this stage)

(iii) **Modifying** – The Authorised Organisational Approver has rejected your application for modifications to be made

(iv) **Submitted** - Your application has been signed off by signatories and submitted to the Wellcome Trust.

(v) **Decision Made** – Your application has been reviewed and a decision has been made by the Wellcome Trust
1. WellcomeTrust have extensive notes on how best to navigate their application procedure on their website:

You can access these notes from the following link: https://wtgrants.wellcome.ac.uk

You can then click on the System Help PDF link.

[Image of Grant Management System]

2. For further help with applying to the Wellcome Trust, please contact:

gtsupport@wellcome.ac.uk

Or call them on:

(Tel) 020 7611 8383
APPENDIX

Wellcome Trust Flow Chart of the CC Grant Tracker Submission Process

Application Created by Lead Applicant

Lead Applicant should press the button to notify the Authorised Organisational Approver (AOR) and also add any other participants such as co-applicants and delegates

Automatic emails sent to advise all

Participants such as Sponsors and Supervisors need to log in and confirm involvement

Applicant finishes entering data

Applicant submits the application

Automatic emails sent to advise AOR

Authorised Organisational Approver must now approve the application

Application is now submitted (yippee!)

Confirmation email sent to applicant