DIABETES UK GRANTS PORTAL USER GUIDE

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Registration and login

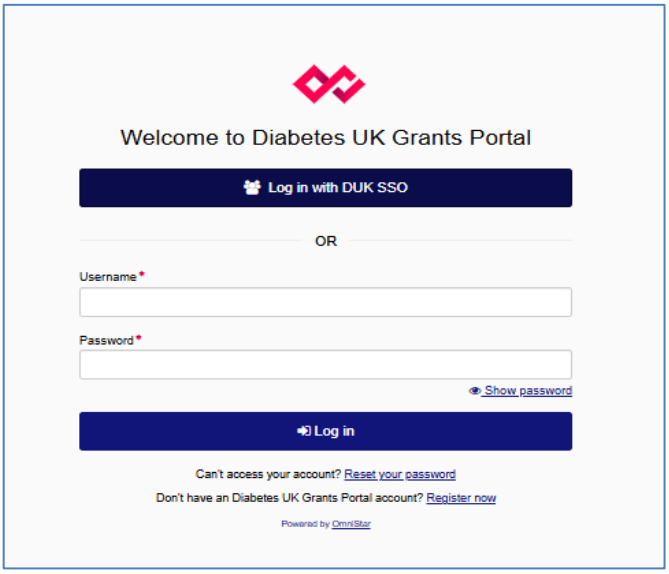
You need to be registered with **Diabetes UK Grants Portal** to apply or participate in an application.

Advice for users with accounts on our Grant Tracker system

If you already have an account on our Grant Tracker system, we have created an account for you on the new Grants Portal using the same email address. Please click **Reset your password** on the Grants Portal login page and enter the email you use to access Grant Tracker.

If you cannot log in, please contact the Research Funding Team.

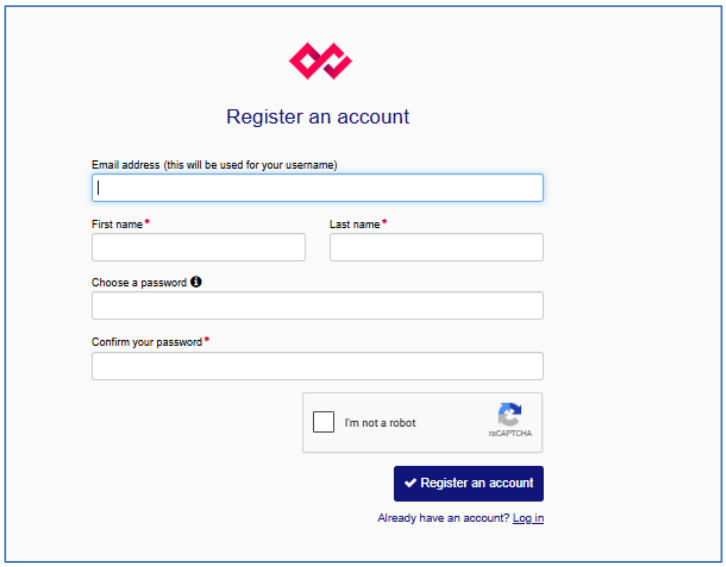
New users



To create an account, click **Register now** on the login page.

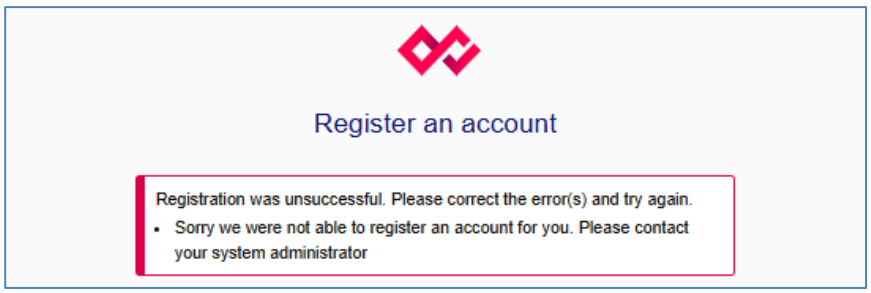
Enter your details and click **Register an account**.

You have the option to login with the Diabetes UK Single Sign-On (SSO) or by using your username and password.



Once you have completed registration, login details will be sent to the email address that you provided. You will be prompted to create a password when you first log in.

If you are already registered on the Grants Portal, you will see an error message:



If this happens, please contact the Research Funding Team.

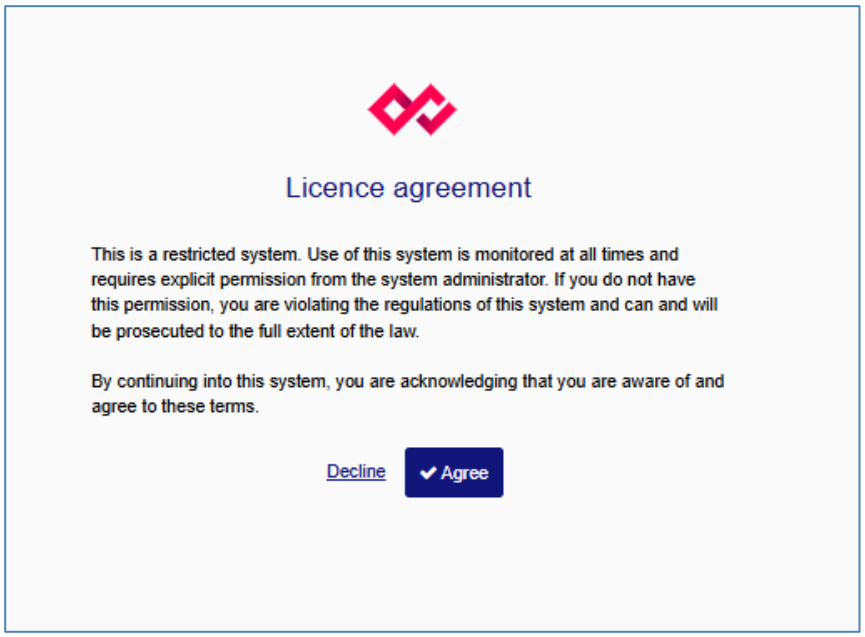
Forgotten passwords and locked accounts

If you have forgotten your password or have a locked account, click **Reset your password** on the login page and a password reset code will be sent to you by email.

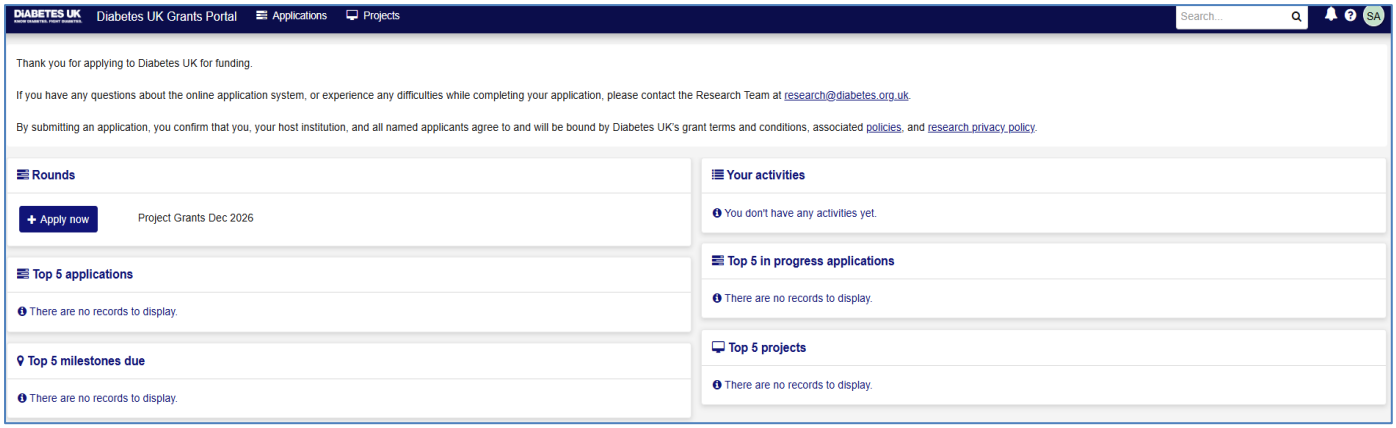
If this does not solve the problem, please contact the Research Funding Team.

License agreement

You will need to agree to the License Agreement to access the Grants Portal.

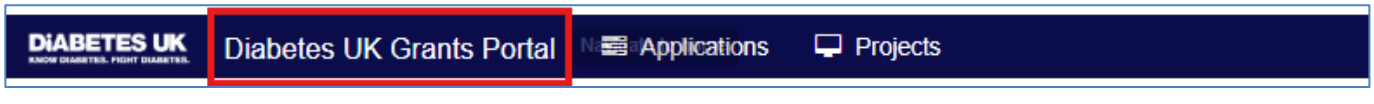


The Grants Portal home page



The Grants Portal home page is the starting point to create or access your applications and manage your details. It is also where you as a grant applicant or award holder can manage your grants, and as a reviewer participate in the review process.

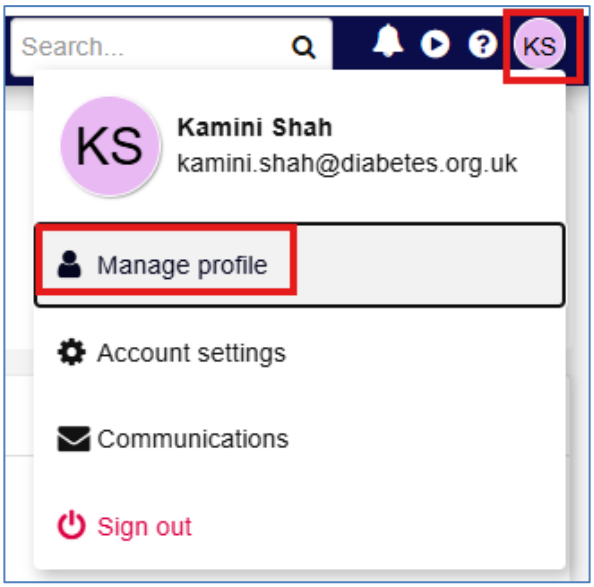
Click on **Diabetes UK Grants Portal** on the page header at any time to return to the home page.

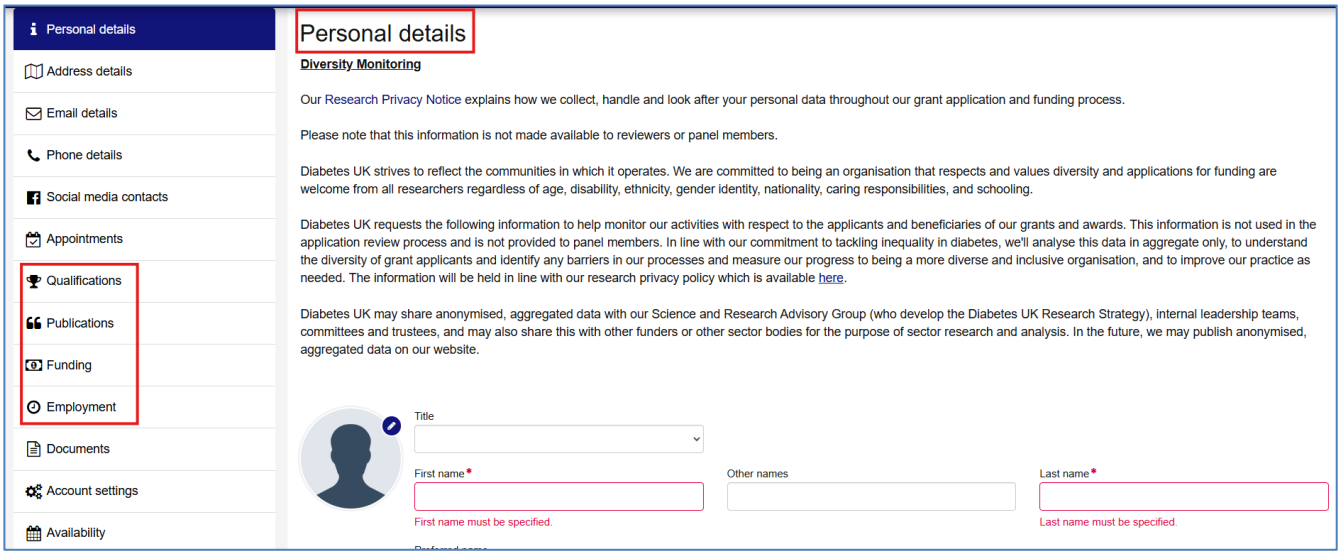


Manage profile

Before starting an application, you should update your information in your Grants Portal profile. This information is used to pre-populate your details in new applications you make. You can also change your password or contact email address here.

Click on the circle containing your initials in the top-right corner of the screen. Then click **Manage profile** in the menu.





Your profile opens on the **Personal details** page. The sections to complete are highlighted in red.

Personal details

Please read the Diversity Monitoring Information, then scroll down to complete your details.

First name and **Last name** are required fields. Please also provide your **Title** and **Preferred name** if this is different from your first name.

Additional fields

Diversity monitoring fields: This information will be used in aggregate, and no individual, identifiable data will be available in the application review process nor is it at any time provided to panel members or staff. These fields are required, but if you do not wish to answer a question, you may select *Prefer not to say*:

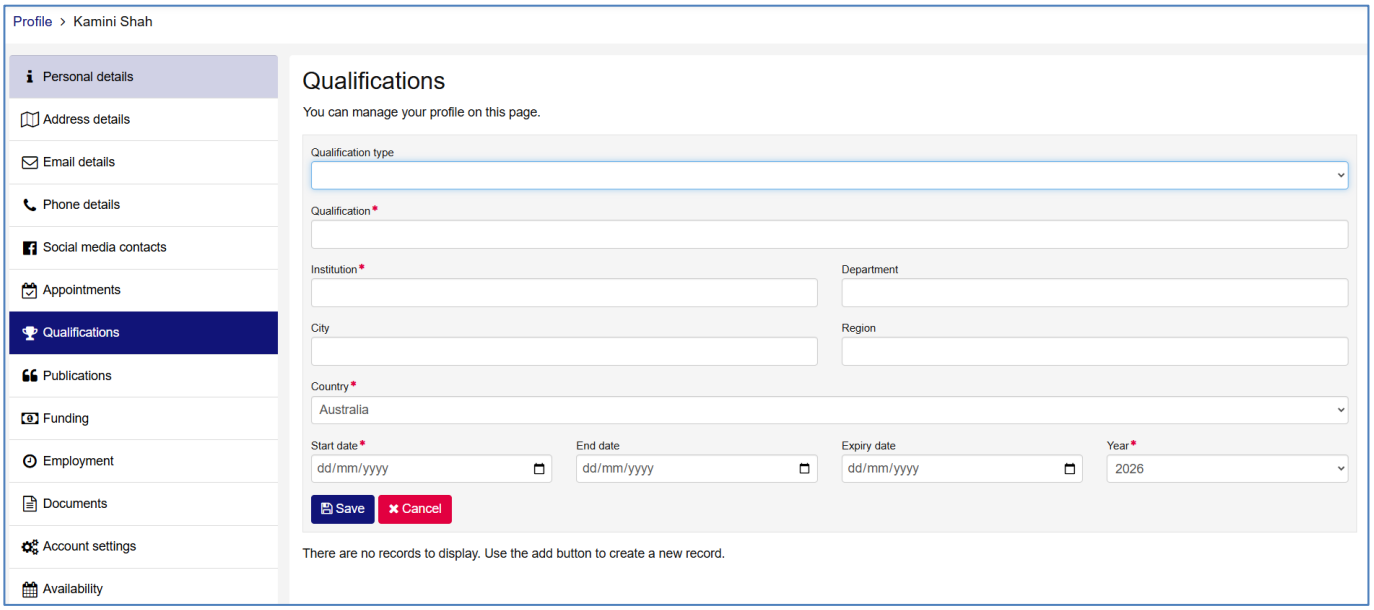
- Age
- Ethnicity
- Schooling
- Cring Responsibilities
- Gender
- Disability
- Nationality

Research E-Communications: Please select if you would like to receive our quarterly research e-newsletter.

Click **Save** when you have finished entering your details.

Qualifications

Enter your relevant qualifications here.



Click **Add new qualification** and enter the following details:

- **Qualification**: Type of degree and title (required)
- **Institution** (required)
- **Department**

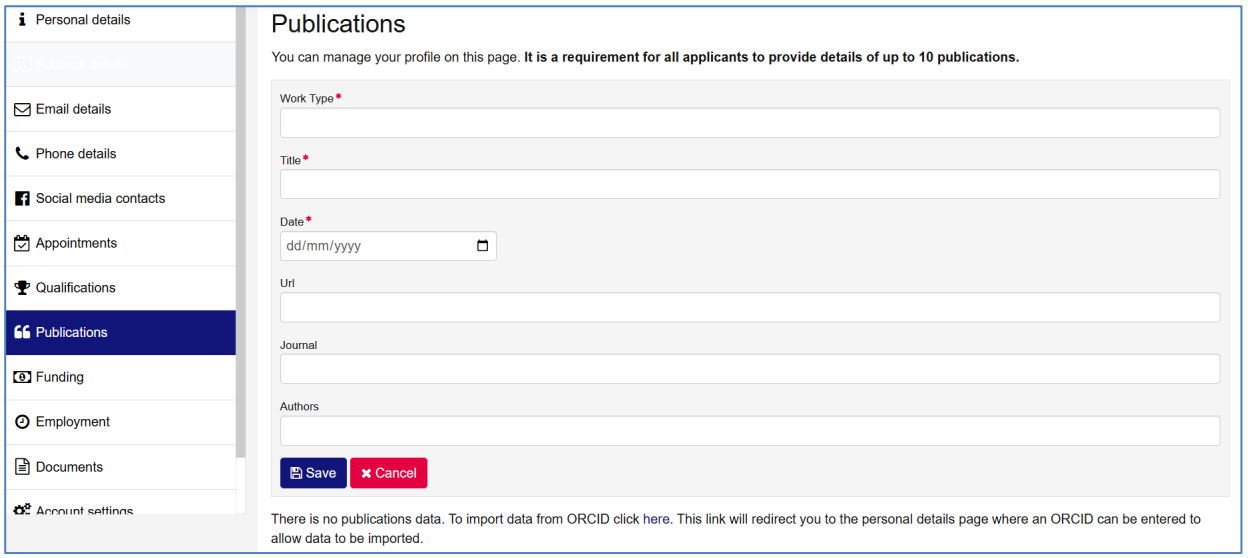
- **Country** (required)
- **Region**
- **Start date** (required)
- **End date**
- **Year of award** (required)

Click **Save**.

Repeat for any further qualifications.

Publications

Enter publications manually (recommended)



Click **Add publication** and enter the following details:

- **Work type**: e.g. journal article; report; preprint (required)
- **Title** (required)
- **Date** (required)
- **URL**: Link to publication
- **Journal**
- **Authors**

Click **Save**.

Repeat for any further manual entries

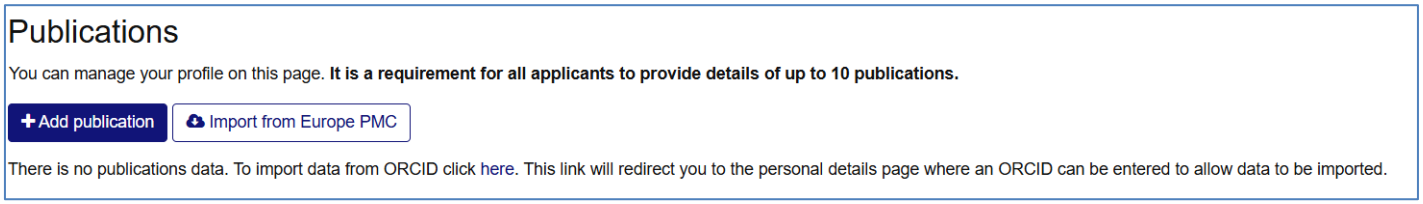
Sync with ORCiD account (not recommended)

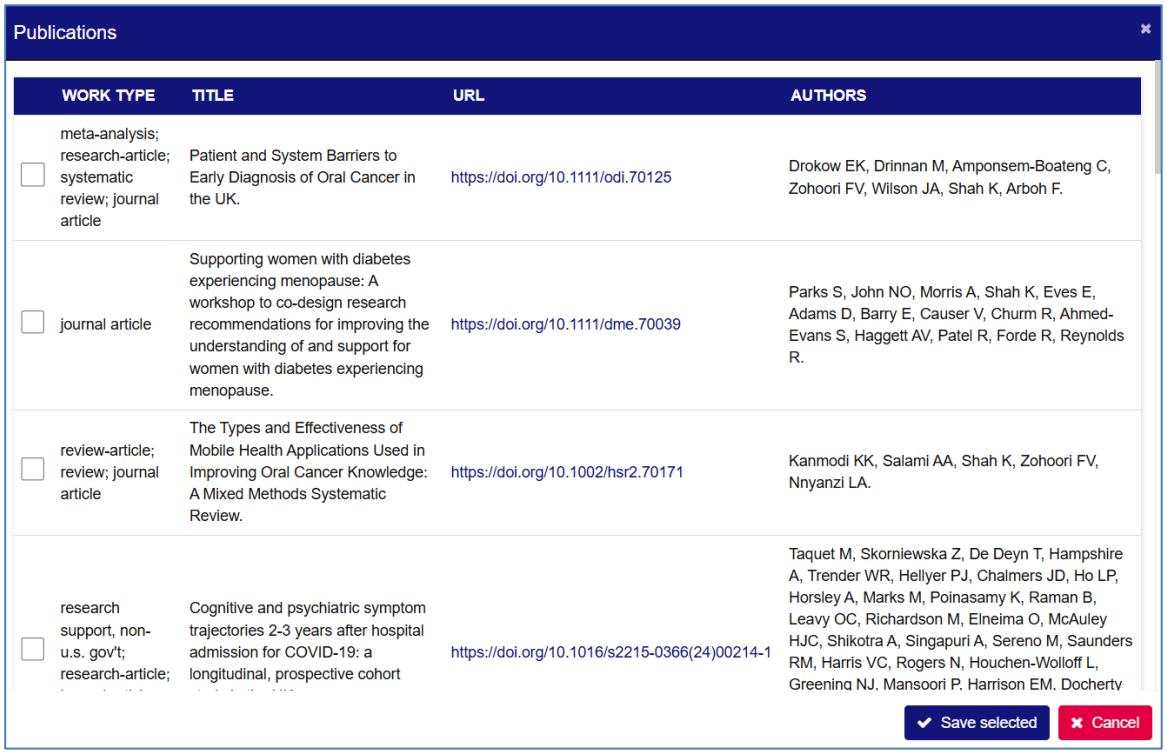
If you have entered your ORCiD reference, this section will automatically populate with your ORCiD publication data. **Note**: *ORCiD imports all output details into your profile, and you will not be able to choose which are included nor edit the record in Omnistar.*

We strongly recommend you enter your publication details manually instead (see below).

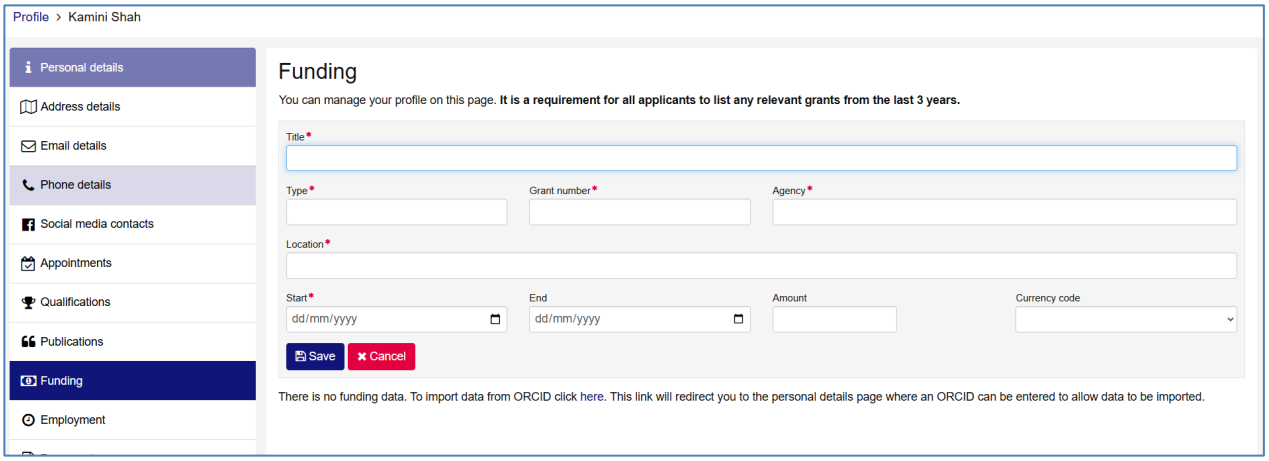
Import from Europe PMC (not recommended)

We do not recommend using the Europe PMC import function as it is not currently user friendly.





If you do choose this method, the Europe PubMed Central will search by your last name. Tick the relevant box(es) to select publication(s). Click **Save selected** to import.



Funding

Enter your grants and awards here.

Click **Add new funding** and enter the following details:

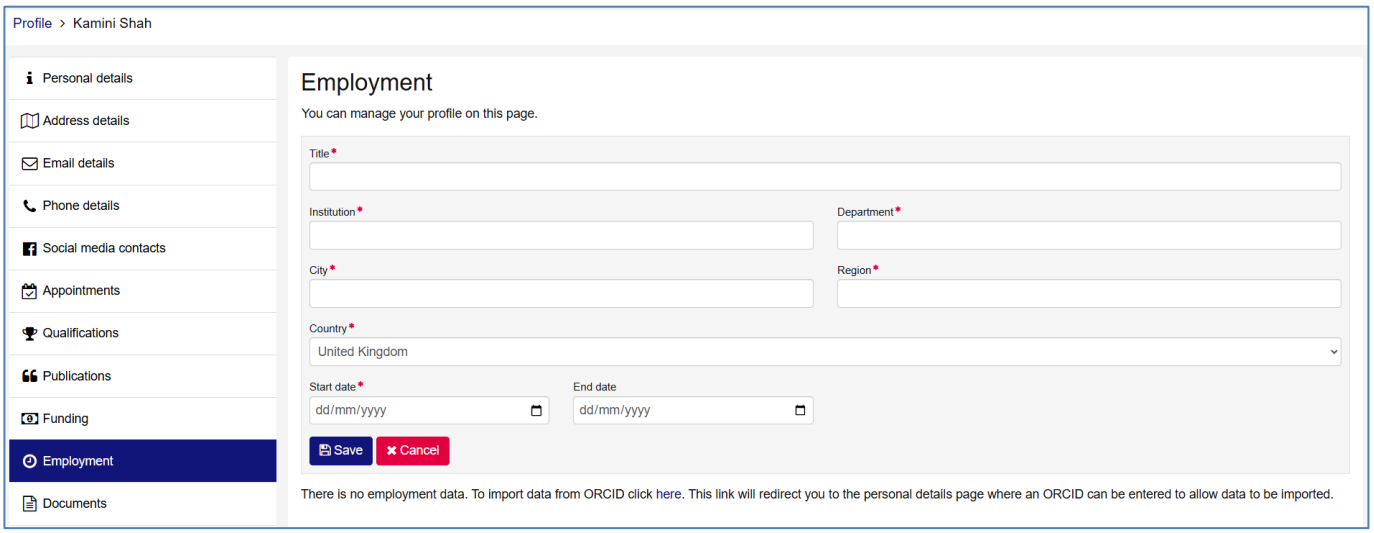
- **Title**: Title of the grant or award (required)
- **Type**: e.g. research award; fellowship (required)
- **Grant number** (required)
- **Agency**: Funder name (required)
- **Location**: Location of the work (required)
- **Start**: Start date of funding (required)
- **End**: End date of funding
- **Amount**: Total funding awarded
- **Currency code**: e.g. GBP for pounds sterling

Click **Save**.

Repeat for further grants/awards.

Employment

Enter details of your current employment and relevant history.



Click **Add employment** and enter the following details:

- **Title**: Job title (required)
- **Institution** (required)
- **Department** (required)
- **City** (required)
- **Region** (required)
- **Country** (required)
- **Start date** (required)
- **End date**

Click **Save**.

Repeat for further employments.

Account settings

This section allows you to:

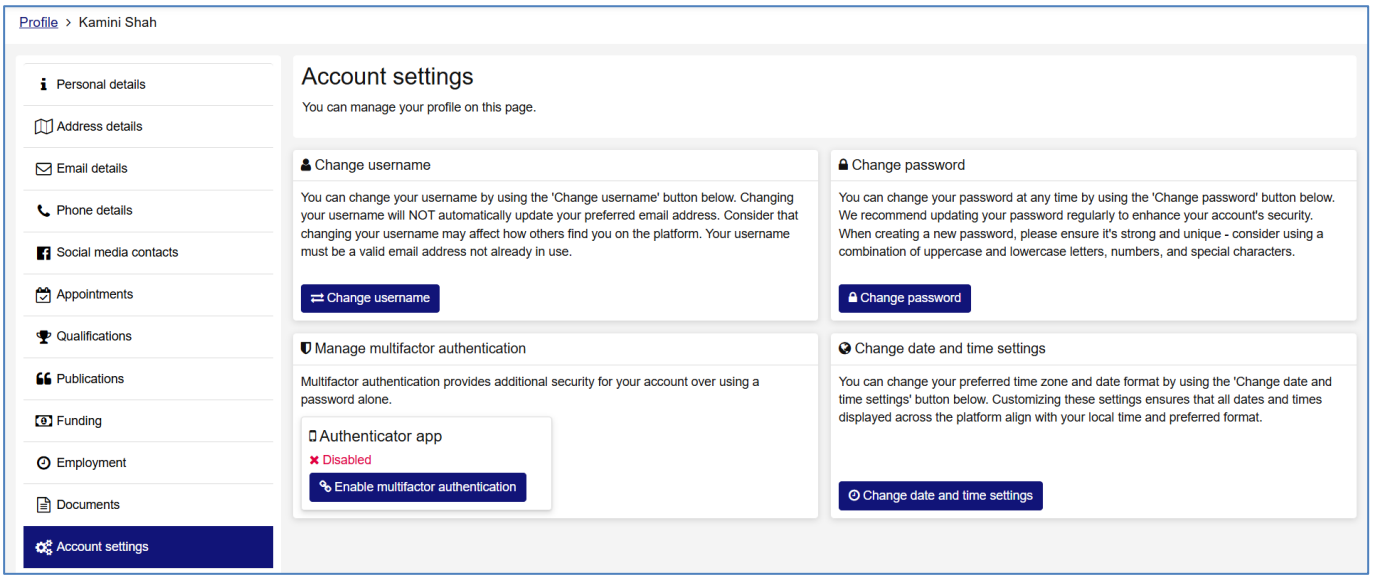
Change username: Changes the email address you use to log in but does not update your preferred email address. To change your preferred email address, click Email details in the side menu of your profile.

Change password: Changes the password you use to log in.

Manage multifactor authentication: Set this up to verify your login using an app on your phone.

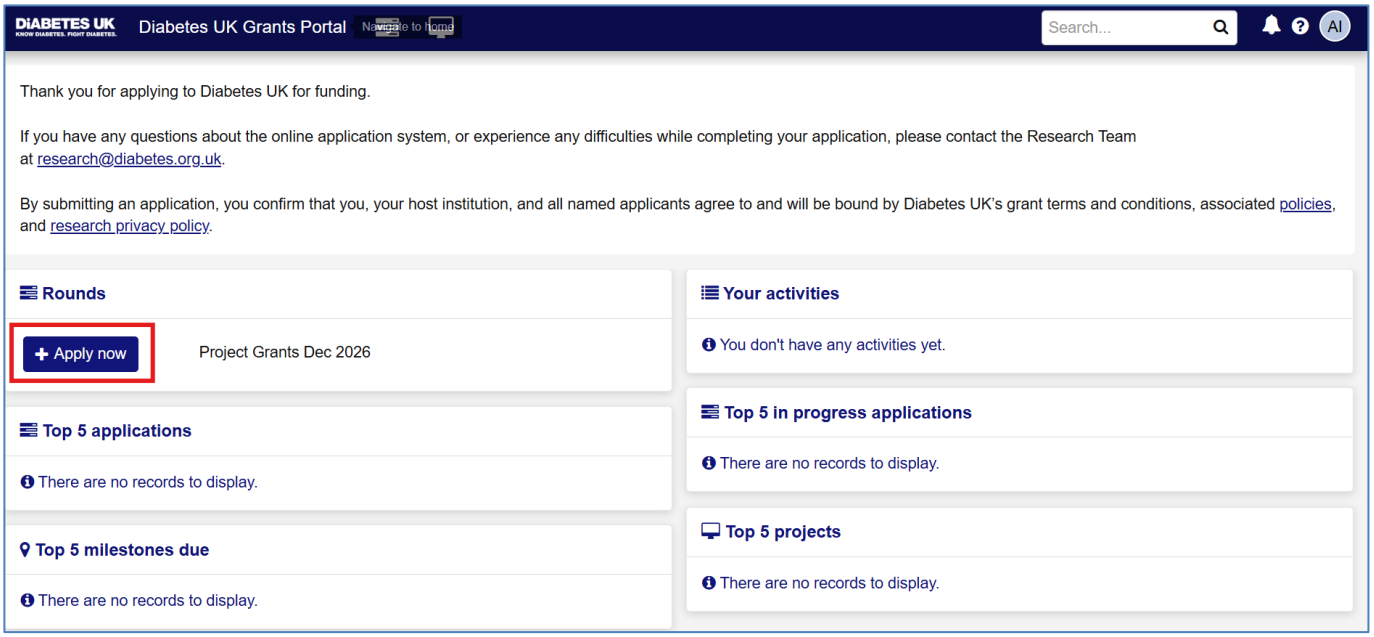
Delete account: This will remove your access to the Diabetes UK Grants Portal.

Change date and time settings: Set your time zone and preferred date format.

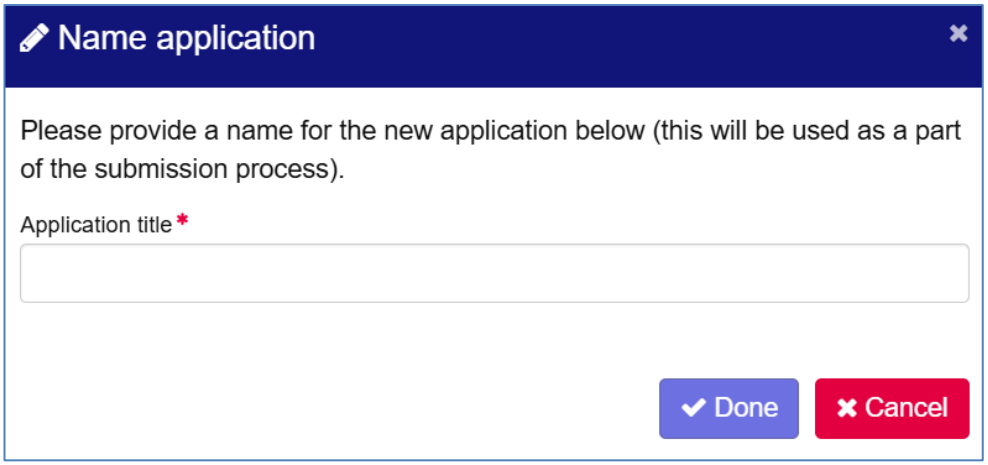


Create an application

Rounds currently open for applications are shown on the left-hand side of the Grants Portal home page. Click **Apply now** to create an application.



Enter a **title** for your application (you can amend this later) and click **Done**.



You can also create an application by clicking on the **Applications** icon in the page header, then clicking **New Application** at the top right of the Applications page.



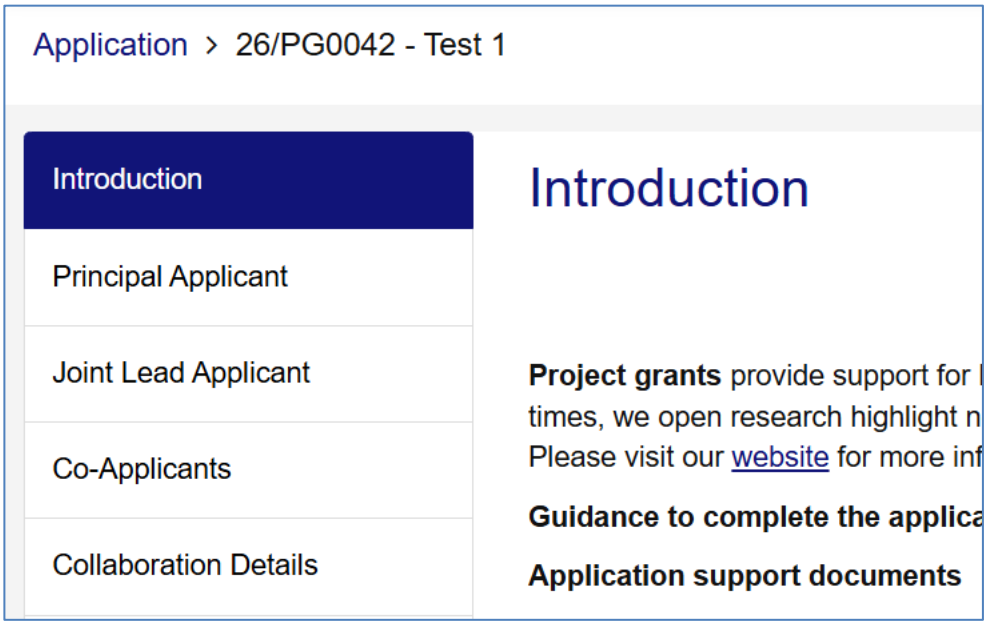
Funding scheme information

Information for each funding scheme can be found on the Diabetes UK website:

- Funding schemes
- Guidance for applying for funding
- Information for patient and public involvement
- Information on our Committees and Panels

The application form

The sections of the application form are listed on the left-hand menu. All mandatory questions (marked with *) must be completed.



Moving through the application

To move through the form use the **Previous** and **Next** buttons or click the sections on the left-hand menu.

Note that if there are any empty required fields on a page, you can only leave the page by clicking on another section on the left-hand menu.

Section status is indicated by icons:

- Complete
- Incomplete

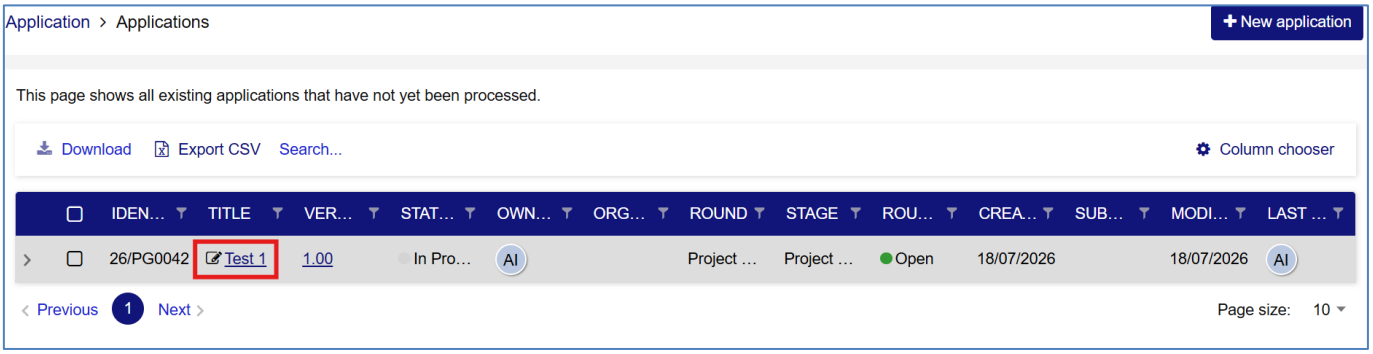
Remember to click **Save** at the top right of the form before moving off a page to avoid the risk of losing data.

Editing the form

You can save and return to the application form as often as you like.

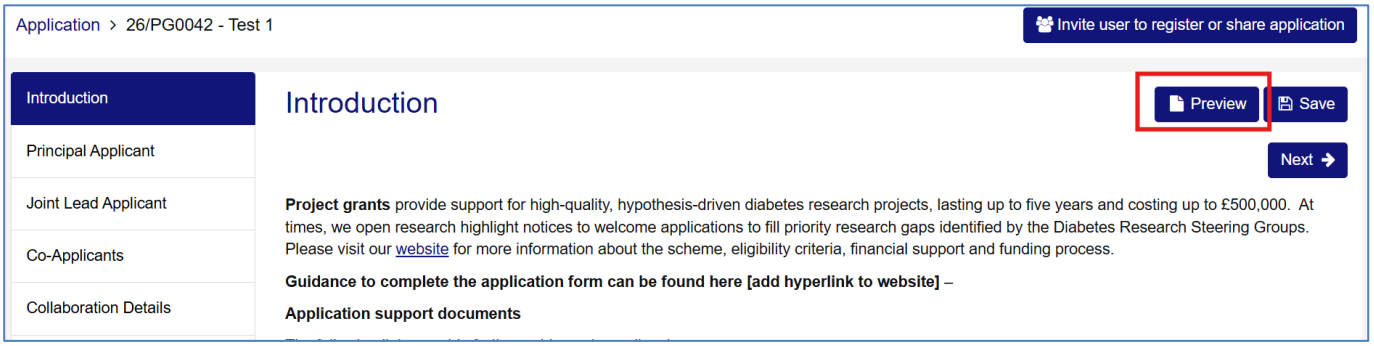
Click **Applications** in the page header.

Click on the application title link to edit the application.



Print or view the form

Click **Preview** at the top right of the form to generate a PDF of your application.



Multiple users

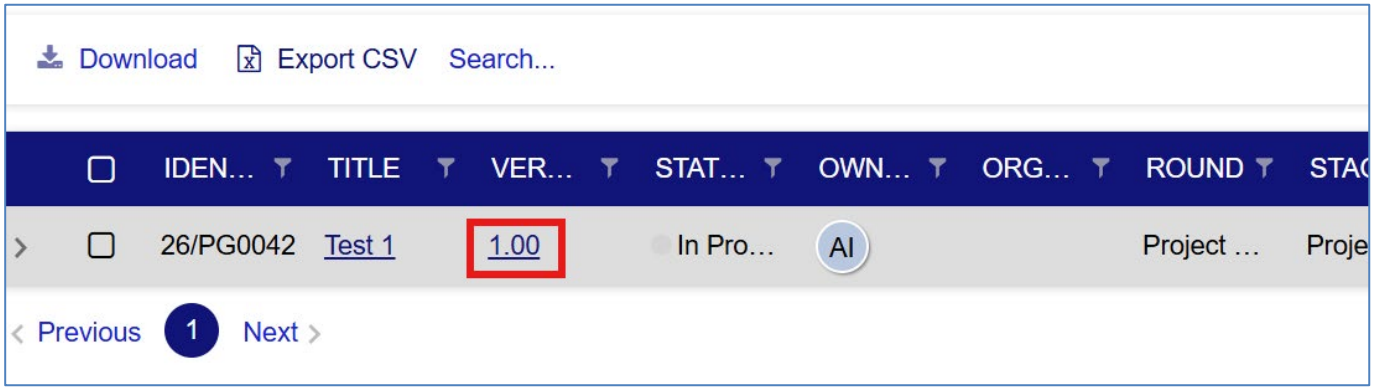
When you open a form that another user is already editing, the system will warn you by displaying the edit icon to the left of the application title link.

When you see this icon you will only be able to open the form in **read-only mode**. Hovering over the edit icon will show you which user has the form open.

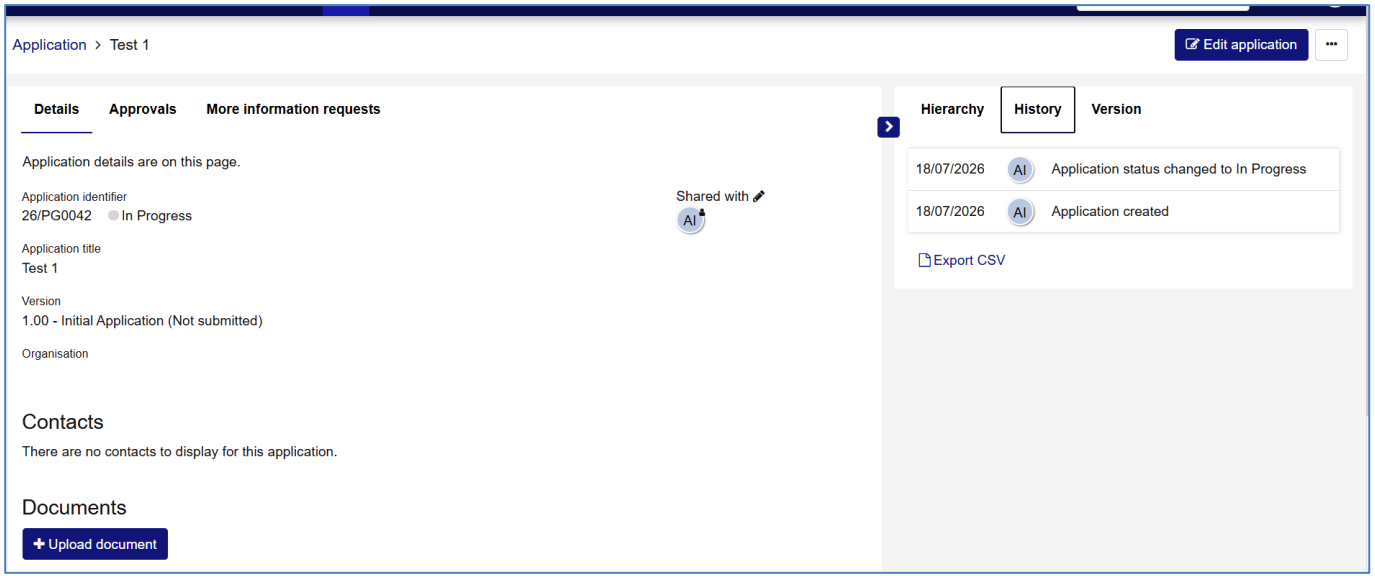


Application details

Click the version number to the right of the application title to open the application details page.



This will display further information about the application.



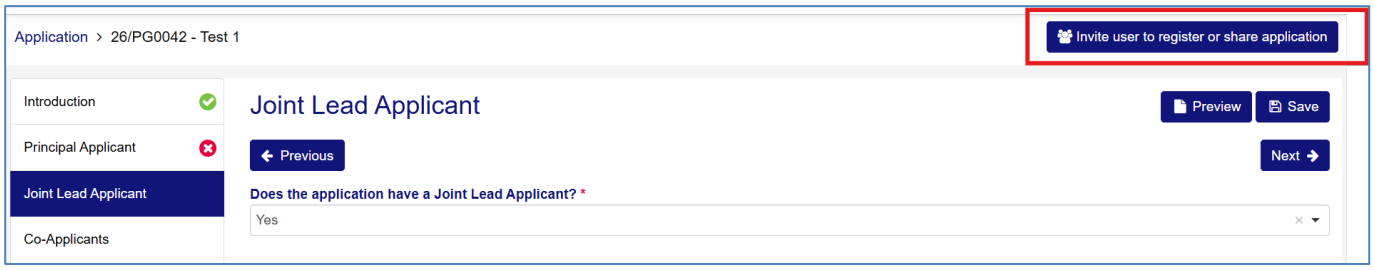
Participants and signatories

If you are the Principal Applicant, you are responsible for inviting others to participate in your application.

- **Participants (includes joint-lead applicants, co-applicants, lived experience co-applicants, sponsors, PhD co-supervisors, collaborators, mentors)**
- **Signatories (includes head of department, finance officer)**

Add a participant or signatory to an application

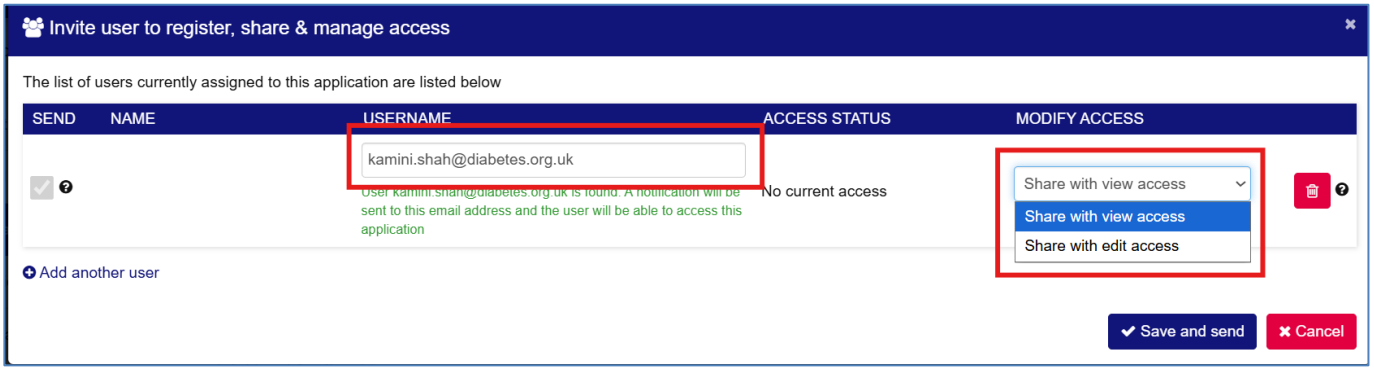
Use the 'invite user to register or share applications' to invite any participants or signatories.



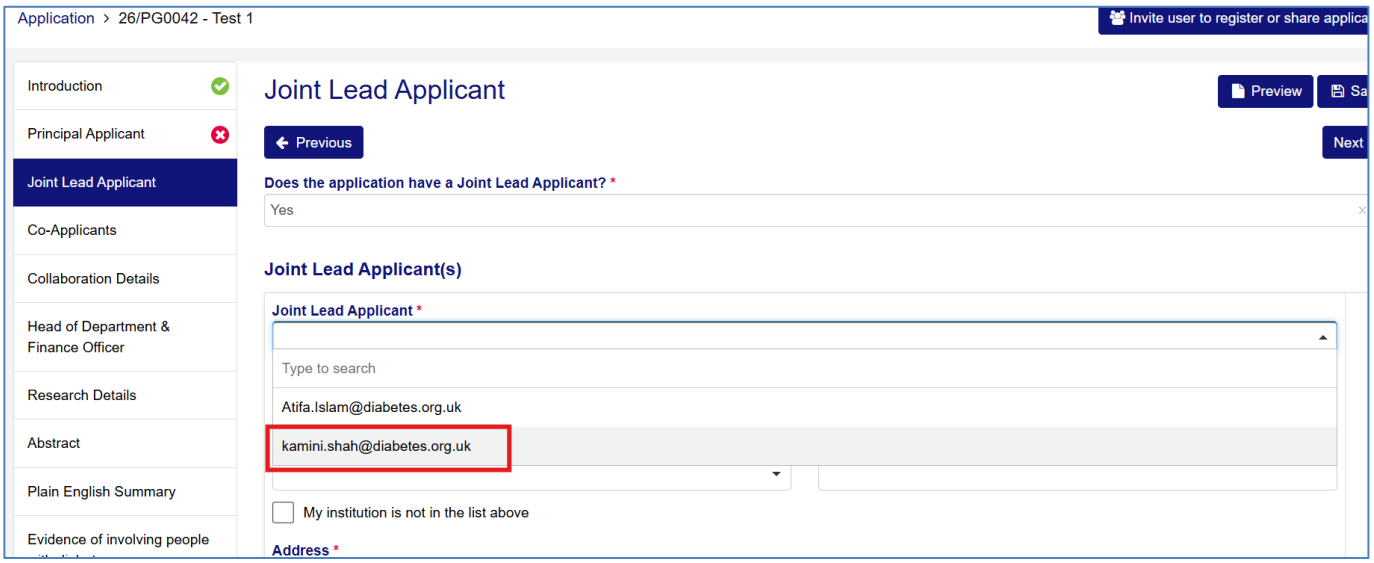
In the **Username** box add the **email** of the participant or signatory you would like to add to the application.

If the participant or signatory are already on our Grants Portal, their name will be found by the system. You can select the access you wish to give them (view access or edit access) using the dropdown menu. **We recommend giving 'edit access' if you require them to edit and/or sign-off the application. For example, joint-applicants, collaborators, Head of Department and Finance Officer.**

Click **Save and send** – this will generate an automatic message to notify them.

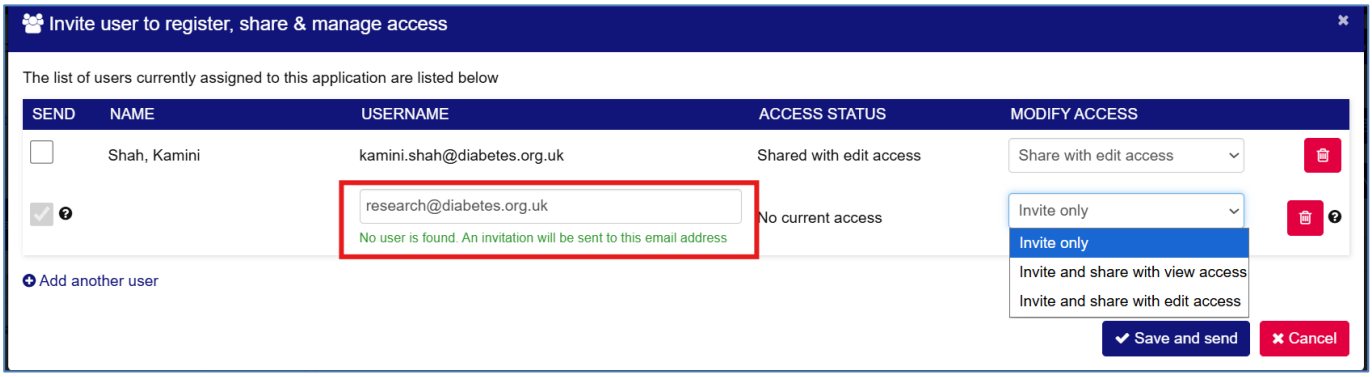


If they are on the Grants Portal, you will now be able to add them to the application form, as their name will appear in the drop-down when you type in their name/email address.



If the participant or signatory is not already on the Grants Portal, they will be sent an invitation to register.

Select the access you would like to give them using the dropdown menu. Click **Save and send**.



You can continue to add other users as necessary.

Participants and signatories will have to register for a Grants Portal account if they do not have one.

Organisation, Department, Position, Profession

Please note that a user's Organisation, Department, Position and Profession can only be edited by Diabetes UK staff at present. **If these details need adding or amending for any of the participants (including Principal Applicant)**, please email details to the Research Funding Team and request an update.

Further actions for participants (not signatories)

The participant's basic information, degrees and qualifications and employment record will automatically appear in the application form PDF based on the information stored in their Grants Portal profile.

Grants and publications must be added to the profile by each individual participant (not required for lived experience co-applicants).

Add relevant grants and publications to the application form

The most recent ten grants and publications will be automatically added to the application. These will be populated by the information provided in the applicants' profile.



Validation, application submission and approval

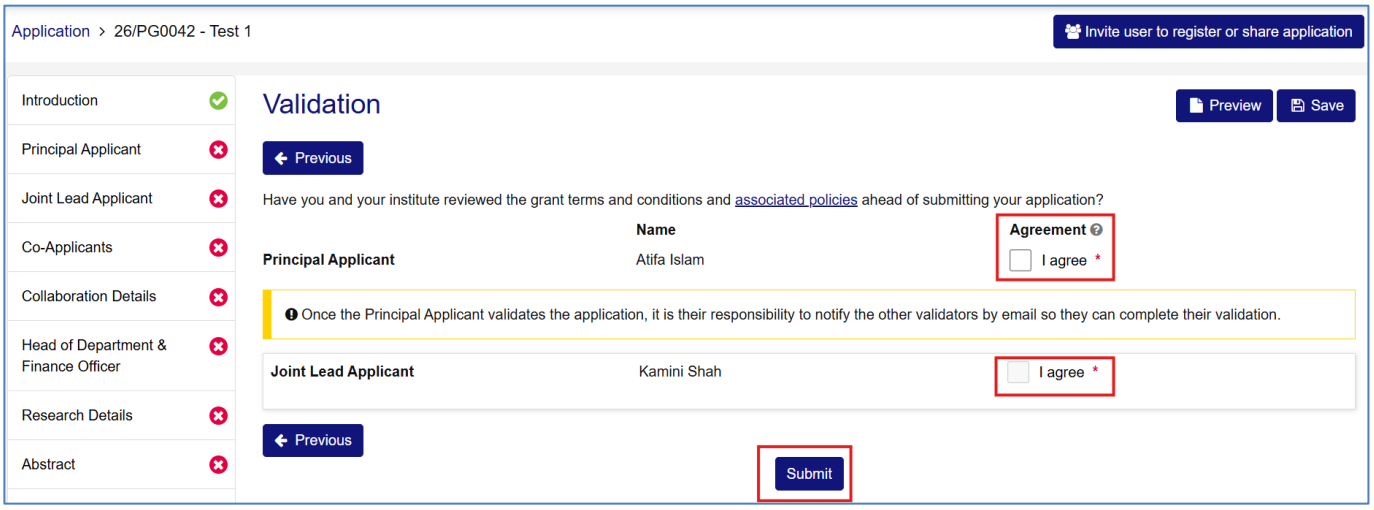
Validation

This section shows whether any mandatory parts of the application are incomplete. If information is missing, you will be directed to the relevant section to complete it.

Application submission

Submitting an application involves two steps:

- All participants must agree to the grant terms and conditions and associated policies before the application is submitted. Once the Principal Applicant has agreed, they must email the other applicants and ask them to log into the Grants Portal and tick the **I agree** box.
- Once all applicants have agreed, the Principal Applicant can submit the application.



Click **submit.**

Approval

Final submission approval is completed by the signatories: the Head of Department and Finance Officer. They will receive an email asking them to approve the application. When they log in to the Grants Portal, the application will appear in the Approvals section.

