# Table of Contents

1. **ABOUT THIS DOCUMENT** .......................................................................................................................... 2  
   1.1. **CONTACT US** ......................................................................................................................................... 2
2. **REGISTRATION** ......................................................................................................................................... 3  
   2.1. **FOR USERS NEW TO OUR ONLINE GRANTS MANAGEMENT SYSTEM** ......................................................... 3
   2.2. **FORGOTTEN PASSWORD** .......................................................................................................................... 4
   2.3. **ACCOUNT LOCK OUT** ............................................................................................................................... 4
3. **HOME PAGE** ............................................................................................................................................. 4
4. **CREATING AND COMPLETING A GRANT APPLICATION** .......................................................................... 5  
   4.1. **AN OVERVIEW OF THE CREATION AND PREPARATION OF A GRANT APPLICATION** .......................................................... 5
   4.2. **CREATING A GRANT APPLICATION** ............................................................................................................... 5
   4.3. **COMPLETING A GRANT APPLICATION** ........................................................................................................... 7
5. **CO-APPLICANTS, SIGNATORIES AND APPROVALS** ...................................................................................... 8  
   5.1. **CO-APPLICANT / SIGNATORY REQUEST EMAIL** .......................................................................................... 8
   5.2. **MY APPROVALS** ..................................................................................................................................... 8
   5.3. **RESPONDING TO AN APPLICATION** .............................................................................................................. 9
6. **MANAGING AN APPLICATION** ................................................................................................................ 9  
   6.1. **MONITORING THE STATUS OF AN APPLICATION** ............................................................................................ 10
7. **SUBMISSION AND BEYOND** ................................................................................................................ 10  
   7.1. **FEEDBACK FROM PEER REVIEW, OPPORTUNITY TO RESPOND TO SCIENTIFIC CRITIQUE AND THE FINAL FUNDING DECISION** .................................................................................. 10
8. **NOMINATING REVIEWERS, INVITATIONS TO REVIEW, AND PANEL MEETINGS** ...................................... 11  
   8.1. **NOMINATIONS OF REVIEWERS BY THE PANEL** ............................................................................................ 11
   8.2. **INVITATIONS TO REVIEW** ........................................................................................................................... 12
   8.3. **ACCEPTING CONFIDENTIALITY (ENCOMPASSING CONFLICT OF INTEREST) POLICY** .......................................................... 12
   8.4. **RESPONDING TO AN INVITATION** ................................................................................................................ 12
   8.5. **RECEIVING THE APPLICATION(S) TO REVIEW** ............................................................................................ 13
   8.6. **CARRYING OUT A REVIEW** .......................................................................................................................... 14
   8.7. **PANEL MEETINGS** ...................................................................................................................................... 14
9. **MANAGING YOUR ACTIVE GRANTS** ........................................................................................................... 16
1. About this document

This document describes how to:

• register as a user of the Kidney Research UK Grant Management System
• use the system to apply for a grant
• confirm your participation as co-applicant or signatory of an application
• review a grant application
• participate as a panel member.

1.1. Contact us

If your query is not answered in these notes you may email us by selecting the Contact Us link within the Grant Management System. Additionally, if you are experiencing any technical problems please use the same link. We will endeavour to answer all queries promptly.
2. Registration

Welcome to the Kidney Research UK Grant Management System

Kidney Research UK is the leading national charity dedicated to research that will lead to better treatments and cures for kidney disease. We provide funding for a wide range of research needs, supporting innovative ideas, developing future research experts, and underpinning work that will further build on the advances and scientific breakthroughs being made.

Please see our website for further information regarding the types of research funding available.
https://www.kidneyresearchuk.org/research/research-strategy-objectives

Via this portal, you can apply online for any of our grants rounds.

The portal is only accessible by registered users who will be accessing the system for one of the following purposes:
- Applicants applying for research grants, by completing an application form online;
- Co-applicants to review and complete their sections of an application;
- Colleagues to confirm their involvement in an application;
- The institute’s named representatives, to check and approve applications;
- Reviewers selected by Kidney Research UK to peer review applications.

Applications for the Kidney Research UK/RECV Joint-funded Clinical Research Training Fellowship, and the MRC/Kidney Research UK Professor David Kerr Cheadle Scientist award are not handled through this portal. To apply for these grants, please visit http://www.mrc.ac.uk/funding/about/apply/application-submission-deadlines/ and apply through the normal MRC application route.

Similarly, applications for the Joint BHF/Kidney Research UK Fellowship for overseas clinicians are not handled through this portal, and applications should be made via the BHF application process. To apply, please visit http://www.bhf.org.uk/heartresearch/programmes/fellowship-program

Before making an application, it is important to read the specific grant Regulations and Conditions (http://www.kidneyresearchuk.org/Grantregulations-and-conditions-apply-to.pdf) and the Portal User Guide.

Applicants

New user - You will need to register before you can use the portal.

Existing user - If you have either applied for funding or have undertaken a review for Kidney Research UK previously, your email address should already be in the system. In which case, you will need to use the “forgot password” link and follow the steps to reset your password

If you have any questions or require assistance, please contact the Research Operations Team at grants@kidneyresearchuk.org or on 01733 367648.

![Registration and log-in page for the Kidney Research UK Grant Management System](image)

**Figure 1.** Registration and log-in page for the Kidney Research UK Grant Management System

2.1. For users new to our online Grants Management 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 email address you register with to identify yourself to the system when logging in.
- The system will use this email address for all correspondence, so it’s a good idea to choose an address you use regularly.
- When you register, an email will be sent to you to allow you to confirm the registration and log in for the first time.
- Don’t worry if you move to a new email address in the future – you can change your registered email address if you need to.
- If you are a grant holder, or if you have previously contributed to an application or undertaken a review, your email address may already be registered. The system will detect this automatically and send you an email with a temporary password to use for your initial log in. You should change the password as soon as possible.
- The system allows you to store the 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, you should 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. Home Page

The home page ([Figure 2](#)) is your starting point to create applications, or to update your details, including your professional and academic CV. It is also where you, as a grant holder, can manage your grants, and as a reviewer or panel member, can participate in the review process.

![Figure 2. Kidney Research UK Grant Management System home page](#)
4. Creating and completing a grant application

4.1. An overview of the creation and preparation of a grant application

1. The Lead Applicant must be the one who creates the application, but it can be jointly completed by the Lead Applicant and any co-applicants.
2. Co-applicants may be added to the application. When a co-applicant is added, the Grant Management System will automatically email them to invite their participation. Co-applicants can decide whether to accept their inclusion, and later to consent to the application being submitted jointly in their name.
3. Applicants and co-applicants can manage their CVs in ‘My Details’. The CVs are automatically included in the application submission.
4. When the application form is complete it must be validated prior to submission. This validation process will highlight any omissions in the form, and allow these omissions to be corrected.
5. Signatories must be selected as part of the application. Their approval is necessary to allow the application to be submitted.
6. When the application is submitted for approval by the Lead Applicant, emails are sent to the signatories (each in turn where there is more than one) informing them that their approval is requested. The Lead Applicant may follow the progress of the approval process on the grant summary page.
7. When all signatories have approved the application, it will be sent automatically to be considered for funding, and a confirmation email will be sent to the Lead Applicant.

4.2. Creating a grant application

You can create a new application from the link on the home page (Figure 3) ...

Figure 3

... or by clicking [New Application] on the 'My Applications' screen (Figure 4).

Figure 4
Both options open the ‘New Application’ page (Figure 5)

Figure 5. The ‘New Application’ page (closing dates are for example purposes only)

1. All the funding rounds currently open are listed. The More info link opens a box with a URL to allow you to find more information on the grant type (www.kidneyresearchuk.org/research/kidney-research-uk-grants).
2. Click Apply to create an application and then you may be asked to complete some eligibility questions (see Figure 6 below) to help you ensure that the application is a valid type for your research and/or career stage. All of these questions must be confirmed before you will be able to proceed to start completing the application form.
4.3. Completing a grant application

1. The sections of the application form are listed as a menu down the left-hand side of the screen (see Figure 7). All sections need to be completed, paying attention to any mandatory questions within each section.

2. You should find the application form as easy to complete as a paper form – and if you are already familiar with electronic forms, you will probably find it much easier.

3. You can move from page to page using the Previous and Next buttons at the top right of the screen, or use the menu on the left-hand side. These actions automatically save any changes you have made on the page.

4. The Save and Close button also saves your work and will return the applicant to the initial details page of the application. Remember to save your work. 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 computer problems.

5. You can save and return to the application form as often as you like.
6. The system will prevent anyone with authorised access to your application from being able to update it at the same time as you. This stops applicants and co-applicants making changes to the same part of the application at the same time and inadvertently overwriting each other’s work.

Please ensure that any attachments you wish to include with your application are first saved as PDFs before uploading.

5. Co-applicants, signatories and approvals

5.1. Co-applicant / signatory request email

If you are invited to participate in an application as co-applicant or signatory, you will be informed about this by email, as shown in Figure 8.

If you click on the link provided in the email, you will be taken to a page where you can accept or decline this invitation.

![Figure 8. Co-applicant / signatory email](image)

5.2. My approvals

If you are invited to participate in more than one application, you can manage your invitations in the ‘My Approvals’ section, as shown in Figure 9.

![Figure 9. ‘My Approvals’ section](image)
5.3. Responding to an application

To respond to an application, select it in the ‘My Approvals’ section. You will then be able to examine the application’s details, to allow you to decide how to respond. When you have made your decision, click Approve or Reject as appropriate.

6. Managing an application

![Managing an application](image)

**Figure 10.** Managing an application

If you select an application from the ‘My Applications’ page (Figure 4), you can manage it, as shown above in Figure 10.

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 PDF features a ‘DRAFT’ watermark, which disappears after the application is successfully submitted.
- **Validate** that your application is complete for submission.
- **Submit the application** for approval – this button is only available when validation has been successfully completed (validation includes confirmation of participation from co-applicants, supervisor (or sponsor in the case of a Senior Fellowship), and any collaborators from other institutions).
• **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:

• **View History** – shows the changes made to the application form, this can be useful for the review of changes made by co-applicants.

• **Journal** - is a notepad function allowing co-applicants to leave messages and/or attachments for each other.

• **Sign-off status** - reports on the progress of the sign-off process by each of the signatories. (See Co-applicants and signatories below for more information)

### 6.1. Monitoring the status of an application

<table>
<thead>
<tr>
<th>Reference</th>
<th>Title</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1575</td>
<td>Project Alpha</td>
<td>04/11/2010 17:11:16</td>
<td>Pre-Submission</td>
</tr>
<tr>
<td>1574</td>
<td>Project Beta</td>
<td>30/08/2010 18:34:12</td>
<td>Pre-Submission</td>
</tr>
<tr>
<td>1573</td>
<td>Project Gamma</td>
<td>25/03/2010 15:31:45</td>
<td>Round Closed</td>
</tr>
<tr>
<td>1567</td>
<td>Project Delta</td>
<td>25/02/2010 16:24:47</td>
<td>Round Closed</td>
</tr>
<tr>
<td>1564</td>
<td>Project Epsilon</td>
<td>04/02/2010 10:21:54</td>
<td>Round Closed</td>
</tr>
<tr>
<td>1563</td>
<td>Project Theta</td>
<td>23/01/2010 11:58:14</td>
<td>Round Closed</td>
</tr>
</tbody>
</table>

**Figure 11.** Application statuses in ‘My Applications’

All grant applications, and their statuses, are listed in the ‘My Applications’ section (see Figure 4) of the system.

### 7. Submission and beyond

• After successful validation the lead applicant may submit the application. Emails will then be sent to each of the signatories (such as the appropriate official for applicant’s institution; the intellectual property officer; the research liaison officer; the research governance framework official) for their approval.

• If a signatory rejects participation in or approval of the application the lead applicant will be notified, along with any feedback the signatory has supplied.

• The applicant can address any areas that caused the rejection of participation or approval and 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 (last signatory approves):
  - The system will assign a grant application number to the application.
  - The system automatically enters the application into the process of being considered for funding, which begins after the grant round closes.

### 7.1. Feedback from peer review, opportunity to respond to scientific critique and the final funding decision

Following the closing date of the grant round, submitted applications for that round will be peer reviewed to decide their suitability for funding. As reviews are received, they will be made available to the relevant applicants so that before the final decision and outcome are reached, there will be an opportunity for applicants to respond to (address or rebut) reviewers’ comments.
8. Nominating reviewers, invitations to review, and panel meetings

You can manage your invitations, reviews and panel meetings directly from within the Grant Management System, in the ‘My Reviews’ section (Figure 12).

Figure 12. ‘My Reviews’ section

8.1. Nominations of reviewers by the Panel

As a designated panel member (DM; selected by the Chair of the Panel), you will be asked to nominate at least four external reviewers who you consider have expertise relevant to the application(s) under consideration.

Figure 13. Nominations of peer reviewers in ‘My Reviews’ section
8.2. Invitations to review

If you are invited to review an application, you will receive your invitation by email, as shown in Figure 14. Invitation emails contain a link which allows you to accept or decline the invitation.

Figure 14. A review invitation email

8.3. Accepting Confidentiality (encompassing Conflict of Interest) Policy

Before you carry out a review you will be asked to agree to a Confidentiality (encompassing Conflict of Interest) Policy (Figure 15).

Figure 15. Accepting Confidentiality Policy

- To read the Confidentiality Guidance provided, click on the .pdf link on the page.
- Click Accept Confidentiality Agreement to proceed.

8.4. Responding to an invitation

You can accept or decline an invitation to review, or alternatively you can tentatively accept the invitation if you would like to carry out the review but for some reason you are not confident you will have the time or opportunity to do so (Figure 16).

If you respond tentatively, this means you permit Kidney Research UK to choose to send you the application if, for example, they have difficulty finding another suitable reviewer. At this point, if you still cannot do the review, you may then decline.
Figure 16. Responding to a review invitation

8.5. Receiving the application(s) to review

If you accept an invitation to review an application, or if you have agreed to participate in reviews generally, you will be sent details about the review(s) by email.
8.6. Carrying out a review

As a reviewer, you will be asked to examine the application in detail, and give your assessment of the application’s potential, novelty, strengths, weaknesses, and so on. (Figure 17)

![Figure 17. Part of the online Review Form](image)

8.7. Panel meetings

You may also be asked to attend a panel meeting to discuss a number of applications. Again, you will be notified of requests to attend via email.

As a meeting attendee, you may be asked to assess the applications involved. The example in Figure 18 shows the list of current meetings which the panel member is being asked to attend; Figure 19 shows the applications for the meeting.
Points to note:

- Attendees can view documents detailing each application, as well as any associated peer reviewers’ comments, and applicant rebuttals.
- The set of applications and reviews for the entire meeting may be downloaded using a link at the bottom of the page.
- Your access to the materials for a particular application may be restricted, where conflicts of interest have been identified.
- If required for this panel, comments may be recorded for each application using the links on the right of the grid.
9. Managing your active grants

Once your grant is active, you will be required to submit regular reports and you can manage any of these through the Grants Management System: uploading new reports; reviewing previously-uploaded reports.