Environmental Protection Agency
An Ghníomhaireacht um Chaomhnú Comhshaoil

EPA Research Programme 2014 – 2020

EPA’s Online Grant Management and Application Portal – User Guide for Grantees

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EPA Research Programme 2014-2020

EPA’s Online Grant Management and Application Portal – User Guide for Grantees

Introduction

This document is a guide for grantees using the EPA’s Grant Management and Application Portal. It describes the functionality and interfaces of the Portal to Principal Investigators (Grantees) undertaking research projects funded by the EPA. The system can be accessed using the following link: https://epa.smartsimple.ie/s_Login.jsp

Please read this document carefully prior to using the EPA Grant Management and Application Portal.

This document does not replace, but is complimentary to the:

1) EPA Research Terms and Conditions for Support of Grant Award
2) EPA Research Guide for Applicants
3) EPA Research Guide for Grantees
4) EPA’s Online Grant Management and Application Portal – Registration & General User Notes
5) EPA’s Online Grant Management and Application Portal – User Guide for Applicants

The above documents are available to download from the Portal or the EPA website (www.epa.ie).

More Information

For further information and assistance with the EPA Grant Management and Application Portal, please contact: research@epa.ie.

Disclaimer

Although every effort has been made to ensure the accuracy of the material contained in this User Guide, complete accuracy cannot be guaranteed. The Environmental Protection Agency does not accept any responsibility whatsoever for loss or damage occasioned or damages claimed to have been occasioned, in part or in full, as a consequence of any person acting, or refraining from acting, as a result of a matter contained in this document.

Enabling Pop-ups

Please ensure that your browser settings permit pop-ups from the web site address displayed by the EPA’s Grant Management and Application Portal (https://epa.smartsimple.ie/s_Login.jsp).

IMPORTANT: If you do not enable pop-ups when logged on to EPA Grant Application and Project Management Portal, many functions will appear not to work simply because the associated pop-up windows cannot be displayed.
# Contents

**Overview** .................................................................................................................. 1
  Grantee Functions ........................................................................................................ 1

**Applicant Workbench** ................................................................................................. 2
  Welcome Note ............................................................................................................... 4
  Help Section ................................................................................................................ 4
  Open Calls Section ....................................................................................................... 5
  Applications and Historic Grants Section ................................................................. 5
  Live Grants Section .................................................................................................... 6
  My Live Grants Tab ..................................................................................................... 7
  Activities Tabs ............................................................................................................. 8

**Technical Progress Report (TPR) Activity** ................................................................. 9
  Completing a Technical Progress Report (TPR) .......................................................... 10
  Saving/Submitting the Technical Progress Report (TPR) ............................................ 18
  Revising the Technical Progress Report (TPR) Following Review ............................... 19

**End of Project Questionnaire (EPQ) Activity** .............................................................. 20
  Create and Complete an End of Project Questionnaire ............................................. 20
  Saving/Submitting the End of Project Questionnaire (EPQ) ........................................ 23
  Revising the End of Project Questionnaire (EPQ) Following Review ......................... 23

**Dataset Metadata Activity** .......................................................................................... 24
  Create and Complete a Dataset Metadata Activity ...................................................... 24
  Saving/Submitting the Dataset Metadata Activity ....................................................... 25

**Financial Report (Cost Statement) Activity** ............................................................... 26
  Completing the Financial Report (Cost Statement) ..................................................... 27
  Saving/Submitting the Financial Report (Cost Statement) .......................................... 28
  Responding to Queries on a Financial Report (Cost Statement) ................................. 28
  Certification & Approval of Financial Report (Cost Statements) ............................... 30

**Budget Reallocation Request Activity** ....................................................................... 31
  Create and Complete a Budget Reallocation Request ............................................... 31
  Saving/Submitting the Budget Reallocation Request ................................................. 32
  Revising the Budget Reallocation Request Following Review .................................... 33
Project Time Extension Request Activity ............................................................... 35
  Create and Complete a Project Time Extension Request ........................................... 35
  Saving/Submitting the Project Time Extension Request ............................................. 36

Travel Outside the EU Request Activity ............................................................... 37
  Create and Complete a Travel Outside the EU Request ............................................. 37
  Saving/Submitting the Travel Outside the EU Request ............................................. 38

Meetings Activity ..................................................................................................... 39
  View the Meetings activity ......................................................................................... 39
  Upload documents in the Meetings activity .............................................................. 40
  Save your changes on the Meeting Activity ............................................................ 40

Final Report Activities .............................................................................................. 41
  Create and Complete a Final Report Activity ......................................................... 41
  Saving/Submitting the Final Report ........................................................................... 43
  Revising the Final Report Following Review ............................................................ 43

Event Feedback Form Activity ................................................................................... 46
  Create and Complete a Misc. Event Feedback Form Activity .................................... 46
  Saving/Submitting the Misc. Event Feedback Form Activity ..................................... 48
  Revising the Misc. Event Feedback Form and Payment Request Activity .................. 48

Maternity/Paternity/Adoptive Leave Request Activity ................................................ 49
  Create and Complete a Maternity/Paternity/Adoptive Leave Request ....................... 49
  Saving/Submitting the Maternity/Paternity/Adoptive Leave Request ......................... 51
  Revising the Maternity/Paternity/Adoptive Leave Request Following Review .............. 52
Overview

The EPA Grant Management and Application Portal is a web-based system which enables you to complete your project management, interim and final reporting requirements:

Grantee Functions

As the Principal Investigator, you can:

1. **Create, edit, and submit interim reports**

   There are 2 different types of interim reports required during the lifetime of an EPA funded research project. These are:
   - Financial Reports (Cost Statements)
   - Technical Progress Reports

2. **Create, edit, and submit miscellaneous requests for approval**

   The EPA’s Grant Management and Application Portal also facilitates the submission of requests for approval for the following activities:
   - Budget Reallocation Requests
   - Project Time Extension Requests
   - Maternity/Paternity/Adoptive Leave Requests
   - Travel outside the EU Requests

3. **Create, edit, and submit final deliverables**

   The following final deliverables are required at the end of a project:
   - Final Report
   - Synthesis Report
   - Policy Brief
   - End of Project Questionnaire (EPQ)
   - Dataset Metadata

4. **View and download/upload meeting documentation**

   It is the responsibility of the Principal Investigator to:
   1. Ensure that all interim reports are submitted on time and that they are of a satisfactory standard that clearly details progress on the project.
   2. Ensure that all requests are submitted in good time.
   3. Ensure all final deliverables are submitted at the end of the project

---

1 The final deliverables required will vary depending on project type, not all the deliverables listed may be required for every project.
Applicant Workbench

Log into the EPA Grant Management and Application Portal to load the Applicant Workbench. The Workbench is laid out in the following sections:

1) Welcome Note
2) Help Section
3) Open Calls
4) Applications & Historic Grants
5) Live Grants

<table>
<thead>
<tr>
<th>Applications &amp; Historic Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>DRAFT APPLICATIONS</td>
</tr>
<tr>
<td>SUBMITTED APPLICATIONS</td>
</tr>
<tr>
<td>HISTORIC APPLICATIONS AND GRANTS</td>
</tr>
</tbody>
</table>

No Results Found

<table>
<thead>
<tr>
<th>Live Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>MY LIVE GRANTS (0)</td>
</tr>
<tr>
<td>TECHNICAL PROGRESS REPORTS (0)</td>
</tr>
<tr>
<td>EPO AND DATASETS (0)</td>
</tr>
<tr>
<td>COST STATEMENTS (0)</td>
</tr>
<tr>
<td>BUDGET REALLOCATION REQUESTS (0)</td>
</tr>
<tr>
<td>MISC. REQUESTS (0)</td>
</tr>
<tr>
<td>MEETINGS (0)</td>
</tr>
</tbody>
</table>

No Results Found
Welcome Note

The welcome note includes the following:

1) The status of your organisation (i.e. approved or pending approval)
2) A link to the Research Call FAQs webpage
3) A link to contact EPA Research Staff
4) Links to subscribe to EPA Research Communication channels

Help Section

The Help Section provides links to

1) Call Documents and PDF guides
2) EPA Research Call Frequently Asked Questions (FAQ’s)
3) Other EPA Funding Opportunities
4) A link to contact EPA Research Staff
Open Calls Section

The Open Calls section lists all the current open calls. The section includes the following:

1) A list of available call topics under the headings of Climate, Sustainability, Water, Green Enterprise, and Event Support
2) A View button, which opens the current call documents, including the Call Technical Description Documents
3) The date and time of the call deadline
4) An Apply button for each call topic

**IMPORTANT:** It is essential that you choose the correct Call Topic Reference by referring to the Call Technical Description Documents as mistakes will not be rectified.

Applications and Historic Grants Section

The Draft Applications tab displays a list of the applications for funding that you have created via the EPA's Grant Application and Project Management Portal but have not yet submitted, i.e. your work-in-progress applications. You can click on any application in the list of Draft Applications to view or edit an application at any point up until it has been submitted. Please note, you can only create a draft application when a call for proposals is open.

The Submitted Applications tab displays a list of all the grant applications you have submitted but which have not been grant awarded. You can click on any application in the Submitted Applications list and view a particular application. Please note you can only submit an application when a call for proposals is open.

The Historic Applications and Grants tab directs you to applications which are no longer active, and includes those which are Completed, Terminated or Missed Deadline.
Live Grants Section

To view and manage your grant awarded projects, scroll to the Live Grants section on your home page. This section contains the following tabs:

- **Technical Progress Reports** enables the submission of technical progress reports for grant awarded projects via a list of pre-generated Technical Progress Report activities, as required during the lifetime of the project.

- **EPQ and Datasets** enables the submission of EPQs and Datasets for grant awarded projects via user generated activities.

- **Cost Statements** enables the submission of financial reports for grant awarded projects via a list of pre-generated Financial Reports (Cost Statements) activities, as required during the lifetime of the project.

- **Budget Reallocation Requests** enables the submission of budget reallocation requests for grant awarded projects via user generated activities.

- **Misc. Requests** enables the submission of other requests such as Project Time Extensions and Travel Outside the EU for grant awarded projects via user generated activities.

- **Meetings** displays a list of the meeting activities associated with your EPA grant awarded projects. You can click on any activity in the Meetings list to view the information related to a particular meeting.

- **Final Reports** enables the submission of Final Reports, Synthesis Reports and State of Knowledge Reports (Research Fellowships only) for grant awarded projects via user generated activities.

- **Event Feedback Form** enables the submission of feedback forms and invoices in relation to the Event Support Grant awards only, via user generated activities.

- **Maternity/Paternity/Adoptive Leave Requests** enables the submission of applications for leave requests of this type, via user generated activities.

Use the arrows highlighted in yellow in the following image to navigate through the different tabs on the Live Grants section.
My Live Grants Tab

Clicking on the Open button at the end of the row will open the grant view page for that project. You will see two tabs – the General and Project tabs:

![General Tab Screenshot]

**The General tab**: This displays brief details of the project including the:

- Project number
- Project type
- Organisation name
- Status of the grant
- Name of the Principal Investigator

**The Project tab**: This view is comprised of several sections which can be collapsed or expanded using the + and - buttons located in the header line of each section as shown in the following image:

![Project Tab Screenshot]

Depending on the type of project you have applied for, these sections may include (but are not limited to):

- Administrative information
- Project Overview
- Budget Summary
- Use of Funding
- Attendees Summary
- Non-profit declaration
- Budget
- Key Project Dates
- Applicant Details
- Project Description
- Budget Details
- Declaration
Activities Tabs

The Live Grants section provides access to all the activities for your EPA grant awarded projects. The activities are listed by project number on individual tabs for each activity type – the example given below shows the Technical Progress Reports activity tab:

The activities can be opened and viewed by clicking on the Open button at the beginning of the row. The status, type of activity, due date (where applicable), and the project title are displayed in the list.

Each activity will be described in more detail in the relevant section of this guide.
Technical Progress Report (TPR) Activity

Technical Progress Reports (TPRs) for Project Based Awards, Green Enterprise Awards and Fellowships are due on the 28th of January and 28th of July each year during the lifetime of the project. You will receive a reminder email 21 days before the TPR is due. The submission of a Technical Progress Report (TPR) involves several steps:

a) Upload of TPR Template.
b) Completion of text boxes on the Technical Progress Report (TPR).
c) Reporting on your project Communication Activities
d) Addition/update of Project Team Details.
e) Addition/update of Events, Conferences, and Workshops
f) Addition/update of details in relation to Physical Indicators under the headings Papers and Conferences for this Period (e.g. Peer reviewed papers) and Summary of Research Product Details (e.g. Models, datasets etc.).
g) Addition of information in relation to funding leverage and linkages.

All TPRs must be submitted by completing the pre-generated Technical Progress Report (TPR) activities for each 6-month reporting period (i.e. 1st January – 30th June / 1st July – 31st December) during the lifetime of the project.

IMPORTANT: It is the responsibility of the Principal Investigator to ensure the TPR is completed using the correct templates and submitted before the reporting deadline.

Open the Technical Progress Report (TPR)

1. Once logged on to the EPA’s Grant Management and Application Portal, scroll to the Live Grants section and click on the Technical Progress Reports tab as shown below:

<table>
<thead>
<tr>
<th>Proposal Number</th>
<th>Type</th>
<th>Technical Progress Report No</th>
<th>Status</th>
<th>Due Date</th>
<th>Project Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Technical Progress Report - Technical Progress Report (TPR)</td>
<td>3</td>
<td>Draft</td>
<td>26/01/2020</td>
<td></td>
</tr>
<tr>
<td>Open</td>
<td>Technical Progress Report - Technical Progress Report (TPR)</td>
<td>1</td>
<td>Draft</td>
<td>26/01/2020</td>
<td></td>
</tr>
<tr>
<td>Open</td>
<td>Technical Progress Report - Technical Progress Report (TPR)</td>
<td>2</td>
<td>Draft</td>
<td>28/07/2019</td>
<td></td>
</tr>
</tbody>
</table>

2. A pre-generated list of Technical Progress Report (TPR) activities associated with each project will be displayed. The list contains summary details of the TPRs that must be submitted during the lifetime of the project. As shown above, this list contains:

- Proposal Number
- Report Type
- TPR Number
- Status
- Due Date
- Project Title
To complete a Technical Progress Report (TPR), click on the Open at the beginning of the row.

**IMPORTANT:** Ensure you choose the report number which relates to the correct reporting period. If you complete and submit a report with an incorrect due date the EPA’s Grant Management and Application Portal will not recognise that the Technical Progress Report (TPR) for the correct period has been submitted and will issue automatic reminder emails at pre-defined intervals stating that the report is overdue.

**Please note** that TPRs which are not submitted using the correct pre-generated reporting activity and template provided, or via the EPA’s Grant Management and Application Portal, will not be accepted.

### Completing a Technical Progress Report (TPR)

The Technical Progress Report (TPR) provides you with details of the current activity and summary project information.

Start by completing the Technical Progress Report Document which can be downloaded using the hyperlink indicated below, once you have completed the template please upload it using the button shown below. You can then complete the overall statement regarding progress:

![Image of the Technical Progress Report Document](image)

**Communications Section**

All fields under the Communication section must be completed. Please note the instructions when completing these fields, for example:

- The number of Tweets issued should **relate to the reporting period only** (i.e. not the total number of tweets which have been posted through your Twitter account)
- The number of impressions should **relate to the reporting period only**

![Image of Communications Section](image)
• Guidance on accessing Twitter analytics can downloaded by clicking on the hyperlink in the communication section:

Please click here for Guidance on how to access twitter analytics

Project Team Details Section

As part of the TPR submission, you are required to provide details of all research team members including yourself as shown below - these details must be updated each time a Technical Progress Report (TPR) is submitted:

![Project Team Details](image)

1. To add a research team member, click on the Create New link in the Project Team Details Section as shown above. You will be taken to a window entitled New Research Team as shown below (this type of window is known as a Transaction List):

![New Research Team](image)

2. You should complete all fields on the form for all members of the research team (one transaction list item per team member).
   a. Reporting Period Field:

   Complete the Reporting Period From and Reporting Period To fields (these dates will be the same as those on the Technical Progress Report (TPR) activity).

   b. Employment Period Field under the Team Member Details heading:

   Enter the dates of the Employment period for each research team member as shown:
3. The Employment Period From and Employment Period To fields relate to the employment period of each team member during the lifetime of the project.
   a) The **Employment Period From field** should be the 1st day that the team member was employed on project – this date should not be changed in subsequent reports once it has been created.
   b) The **Employment Period To field** should be updated each time you submit a TPR, in circumstances where the team member is still employed on the Project. This date should never be later that the end date of the reporting period (i.e. Reporting Period To: Field above). If the team member is no longer employed on the project, no further action is required.

4. Complete all the other fields on the transaction list window then click on the **Save** button at the bottom of the page – **please note that all fields are compulsory.**

5. To add additional project team members without going back to the Technical Progress Report (TPR), click the **plus** button at the top of the transaction list window as shown below and repeat the earlier steps.

6. Once you have finished adding details of all project team members, click on the **Save** button and then on the **X** in the top corner of the tab on your browser to close the window:
7. Details of all project team members will appear on the Technical Progress Report (TPR) as shown below, once you click the **Save Draft** button on the Technical Progress Report (TPR).

<table>
<thead>
<tr>
<th>Reporting Period</th>
<th>Employment Period</th>
<th>Full Name</th>
<th>Email Address</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>From: 27/04/2017</td>
<td>To: 30/04/2017</td>
<td>Dr. Testerson</td>
<td><a href="mailto:testparticipant@fake.take">testparticipant@fake.take</a></td>
<td>Technician</td>
</tr>
<tr>
<td>From: 01/04/2017</td>
<td>To: 01/04/2017</td>
<td>Mr. TestingMcTester</td>
<td><a href="mailto:testermctester@testfake.take">testermctester@testfake.take</a></td>
<td>Research Assistant</td>
</tr>
<tr>
<td>From: 27/04/2017</td>
<td>To: 01/04/2017</td>
<td>Mr. Joe King</td>
<td>test@testfake</td>
<td>PhD Student</td>
</tr>
</tbody>
</table>

8. To amend/update the details of a project team member for subsequent reporting periods, click on the **View All** link in the Project Team Details Section as shown below:

9. This will open the transaction list window detailing the project team members associated with the project as shown below. You should click on the **Open** button of the relevant participant as shown below:

10. On the **Edit Research Team** transaction list window, you can then edit the Employment Period **To** field for each project team member who continues to be employed on the project.

**NB:** You should **not** amend the details of participants who are no longer working on the project.

11. When you have edited the participant’s details, click the Save button, and then click on the X in the top corner of the tab on your browser to close the window.

12. The amended details of the project team members will appear on Technical Progress Report (TPR), once you click the **Save Draft** button on the Technical Progress Report (TPR).

Repeat these steps for each participant whose details need to be amended.
Events/Conferences and Workshops Section

Add details of events/conferences and workshops held relating to this project by clicking on the **Open** button and entering the details:

![Events/Conferences and Workshops](image)

This will open a new pop-up window:

![Events Organised](image)

1. Click on the **plus** button to create a new entry, then complete all the fields.

2. If you enter details incorrectly you can delete/clear:
   a. a single entry, by clicking on the **X** button at the end of the row
   b. the sheet completely, by clicking on the **Clear** button at the bottom of the page

3. When you have added all entries, click on the **Save** button, then click on **Close** to return to the Technical Progress Report (TPR) activity.

Report on Physical Indicators Section

As part of the TPR submission, you are required to provide details of Papers and Conferences and Research Product Details related to your project.
You should provide details of:

- Papers appearing in peer reviewed journals and conference proceedings (Authors, Title of Paper, Publication Details, Status etc.)
- Conference papers, presentations, posters (Authors, Title of paper, Conference Details etc.)
- Other papers, posters, publications (including trade magazines, newspaper articles etc.)
- Research products (e.g. models, data-sets, methodologies, innovations, patents, trademarks etc.)
- Reports to policy and decision makers on environmental issues: (Report Title, Relevant legislation etc.)

All items from the project start date should be included. Copies of papers published/presented in the current reporting period should be uploaded in the relevant fields described below.

**Papers and Conferences**

To add details of Papers and Conferences, click on the **Create New link** in the Report on Physical Indicators section as shown below:

**NB:** You will also need to tick the declaration to confirm all publications are compliant with the EPA Research Programme’s policy on Open Access and data.

This will open the **New Papers and Conferences** transaction list window as shown:
1. Complete the Reporting Period From and Reporting Period To fields (these dates will be the same as those on the Technical Progress Report (TPR) activity) and all relevant fields in the Physical Indicators Section as shown above.

2. Click the Save button. At this point, you can also upload papers, presentations, posters, etc. in the Attach Paper, Presentation or Poster Field as shown below:

3. To add additional Papers and Conferences without going back to the Technical Progress Report (TPR) activity, click the Plus (+) button at the top of the transaction list window as shown below and repeat the previous steps.

4. When you have finished adding details of Papers and Conferences, click on the X in the top corner of the tab on your browser to close the window:

5. Details of Papers and Conferences will appear on the Technical Progress Report (TPR) activity when you click the Save Draft button on the Technical Progress Report (TPR).

Research Product Details

To add Research Product Details, click on the Create New link in the Summary of Research Product Details section as shown in the following image:
1. Complete the Reporting Period From and Reporting Period To fields (these dates will be the same as those on the Technical Progress Report (TPR) activity) and all relevant fields in the Product Section as shown above.

2. Click the Save button – you will then be able to upload any relevant documents in the Attach Document field as shown below:

3. To add additional Research Product details without going back to the Technical Progress Report (TPR) activity, click the Plus (+) button at the top of the transaction list window and the previous steps.

4. Once you have finished adding the details of Research Products, click on the X in the top corner of the tab on your browser to close the window:
Details of Research Products will appear on the Technical Progress Report (TPR) activity once you click the **Save Draft button** on the Technical Progress Report (TPR).

**Funding Leverage & Linkages Section**

In the Funding Leverage & Linkages section, select the relevant option from the dropdown menu, and where required, provide details in the text field:

![Funding Leverage & Linkages](image)

**Saving/Submitting the Technical Progress Report (TPR)**

You can save the information you have entered on the Technical Progress Report (TPR) activity at any point by clicking on the **Save Draft button** and can return to the TPR later to continue adding details.

1. Once you are satisfied that all relevant information has been included and completed template uploaded, the Technical Progress Report (TPR) should be submitted by clicking on the **Submit button** at the bottom of the page.

2. Clicking Submit will automatically change the status of the activity from Draft to Submitted as shown below and will trigger an email to:
   a) You, confirming that the Technical Progress Report (TPR) activity has been submitted successfully.
   b) The EPA Research Officer administering your project stating that the TPR is available for review.

3. Following its submission, the EPA Research Officer will review the Technical Progress Report (TPR). If the TPR receives a satisfactory review, it will be signed off and the status will change to Approved.
Revising the Technical Progress Report (TPR) Following Review

If the TPR received an unsatisfactory review, you will be notified by an auto-generated email outlining the revisions required. The status of the Technical Progress Report (TPR) will change to **Revisions Required** as shown below.

You are required to revise and resubmit the TPR within 14 days of receiving the notification email.

1. Log into the EPA's Grant Management and Application Portal and scroll to the **Live Grants** section.
2. Select the Technical Progress Reports tab, locate the TPR in the list and click on the **Open** button.
3. When you are satisfied that you have addressed the reviewers’ comments and all relevant information has been included, click on the **Submit** button at the bottom of the page. Clicking Submit will automatically change the status of the Technical Progress Report (TPR) activity from Revision Required to Submitted and notification emails will be sent.
4. The EPA Research Officer will review the Technical Progress Report (TPR). If the TPR receives a satisfactory review, it will be signed off and the status will change to Approved. You will be notified by automated email once the EPA has approved your Technical Progress Report (TPR).
End of Project Questionnaire (EPQ) Activity

Create and Complete an End of Project Questionnaire

Log into the EPA’s Grant Management and Application Portal, scroll to the Live Grants section, locate the correct project in the list and click on the **New Activity button** at the end of the row:

The **New Activity** window will now open:

1. Select **End of Project Questionnaire (EPQ)** using the Create Activity drop-down list, then click on the **Create** button.

2. The new End of Project Questionnaire (EPQ) activity will now open on your screen:

3. Amend the **Project Team** details, where required (the information from your last Technical Progress Report has been copied across)
   a) Click on **Create New** to create a new record
   b) Click on **View All** and on selected record to amend an existing record
4. Amend the **Report on Physical Indicators**, where required (the information from your last Technical Progress Report has been copied across) – please note that there are two sections: **Papers and Conferences** and **Research Products Details**
   a) Click on **Create New** to create a new record
   b) Click on **View All** and on selected record to amend an existing record

5. Complete the **Report on Esteem Indicators** (not required for Scholarships)
   a) Click on **Create New** to create a new record
   b) Click on **View All** and on selected record to amend an existing record
6. Complete the **Report on Research Impact Indicators** (not required for Scholarships) – please note that there are three sections: **Summary of Policy Impacts**, **Summary of Commercial Impacts** and **Summary of Collaborative Impacts**.

   a) Click on **Create New** to create a new record

   b) Click on **View All** and on selected record to amend an existing record

7. Complete the field entitled **Experience gained from working on this project** (not required for Scholarships). Please note the **200-word limit**.

8. Complete the field entitled **Research Strategy** (not required for Scholarships). Please note the **200-word limit**.
9. Select the relevant answer in the dropdown in the field entitled **Funding Leverage & Linkages**, and provide details where required.

10. Click on **Save Draft** to save your changes.

**Saving/Submitting the End of Project Questionnaire (EPQ)**

1. You can save information you have entered on the End of Project Questionnaire (EPQ) by clicking the **Save Draft** button, and then return to it later to add additional information.

2. When you are satisfied that all relevant information has been included, the End of Project Questionnaire (EPQ) should be submitted by clicking on the **Submit** button at the bottom of the page.

3. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the request has been submitted successfully.
   b) The EPA Research Officer administering your project stating that the questionnaire is available for review.

Your End of Project Questionnaire (EPQ) will now be reviewed. You will receive an auto-generated email advising you of the outcome of this review. The status of the activity will change from Submitted to Approved or Revision Required (a reason will be provided in all instances where an EPQ is not approved).

**Revising the End of Project Questionnaire (EPQ) Following Review**

If the EPQ received an unsatisfactory review, you will be notified by an auto-generated email outlining the revisions required. The status of the EPQ will change to Revisions Required.

1. Log into the EPA’s Grant Management and Application Portal and scroll to the **Live Grants** section.

2. Select the **EPQ & Datasets tab**, locate the EPQ in the list and click on the **Open button**.

3. When you are satisfied that you have addressed the reviewers’ comments and all relevant information has been included, click on the **Submit button** at the bottom of the page. Clicking Submit will automatically change the status of the EPQ from Revision Required to Submitted and notification emails will be sent.

4. The EPA Research Officer will review the EPQ. If the EPQ receives a satisfactory review, it will be signed off and the status will change to Approved. You will be notified by automated email once the EPA has approved your End of Project Questionnaire.
Dataset Metadata Activity

It is a requirement of all EPA Research funded projects that all outputs produced by the research and associated metadata are made digitally available (where relevant) to the EPA.

Create and Complete a Dataset Metadata Activity

Log into the EPA’s Grant Management and Application Portal, scroll to the Live Grants section, locate the correct project in the list and click on the New Activity button at the end of the row:

![Image of New Activity window](image)

The New Activity window will now open:

1. Select Dataset Metadata using the Create Activity drop-down list, then click on the Create button.
2. The new Dataset Metadata activity will now open on your screen:

3. Download and complete the **Metadata template** by clicking on the link available in the Dataset Metadata section.

4. Upload the completed Metadata template *(in Excel format only)* by clicking on the **Upload Dataset button** in the Upload Dataset Metadata field.

5. Click on the **Save Draft button** to ensure your template is attached to the activity.

**Saving/Submitting the Dataset Metadata Activity**

1. You can save information you have entered on the Dataset Metadata Activity by clicking the **Save Draft button**, and then return to it later to add additional information.

2. When you are satisfied that all relevant information has been included, the Dataset Metadata Activity should be submitted by clicking on the **Submit button** at the bottom of the page.

3. Clicking on **Submit** will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the Dataset Metadata Activity has been submitted successfully.
   b) The EPA Research Officer administering your project stating that the Dataset Metadata Activity is available for review.
Financial Report (Cost Statement) Activity

Cost Statements for Project Based Awards, Green Enterprise awards and Fellowships are due on the 28th of January and 28th of July each year during the lifetime of the project. You will receive a reminder email 21 days before each Cost Statement is due.

All Cost Statements must be submitted by completing the pre-generated Financial Report (Cost Statement) for each 6-month reporting period (i.e. 1st January – 30th June / 1st July – 31st December) during the lifetime of the project.

Open the Financial Report (Cost Statement)

1. Having logged on to the EPA’s Grant Management and Application Portal, scroll to the Live Grants section, and select the Cost Statements tab.
2. A list of Financial Reports (Cost Statements) will then be shown for each of your live grants, along with their due date.
3. You can begin the process of submitting a Cost Statement online, by clicking on the Open button next to the Cost Statement which is due to be submitted.

IMPORTANT: Ensure you choose the report number which relates to the correct reporting period.

If you complete and submit a report out of sequence (i.e. for the wrong reporting period) the EPA’s Grant Management and Application Portal will not recognise that a Cost Statement for the correct period has been submitted and will continue to issue automatic reminder emails at pre-defined intervals to notify you your Cost Statement is overdue.

Please note that Cost Statements, which are not submitted using the correct pre-generated reporting activity and template provided, or via the EPA’s Grant Management and Application Portal, will not be accepted.
Completing the Financial Report (Cost Statement)

The Financial Report (Cost Statement) provides you with details of the current activity and summary project information.

1. You should download the Cost Statement Template using the link provided under Financial Report (Cost Statement) as shown below:

2. The Cost Statement template should then be completed for the lead organisation. Additionally, where a project has more than one participating organisation, each participant will need to complete a separate Cost Statement template. Each participant including the lead organisation should ensure that all relevant signatures, data, and supporting documentation outlined in the template are provided prior to upload. All documents should be uploaded by clicking on the Upload button as shown above.

3. It is the responsibility of the Principal Investigator to upload all Cost Statement templates and supporting documentation. Project participants should therefore forward their completed Cost Statement template electronically to the Principal Investigator as a PDF document along with all relevant supporting documentation. To facilitate the certification process, an Excel version of each participants Cost Statement must also be uploaded.

4. To ensure that all uploads are attached to the Financial Report (Cost Statement) page, you should click on the Save Draft button at the bottom of the page as shown below:
Saving/Submitting the Financial Report (Cost Statement)

1. You can save information you have entered on the Financial Report (Cost Statement) as many times as you like prior to submission by clicking the **Save Draft** button.

2. You can return to the Financial Report (Cost Statement) at a later date by repeating the above steps.

3. Once you are satisfied that all relevant information has been included, the Financial Report (Cost Statement) should be submitted by clicking on the **Submit** button at the bottom of the page as shown below:

   ![Submit and Save Draft Buttons](image)

4. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the Cost Statement has been submitted successfully.
   b) The EPA’s financial consultants, stating that the Cost Statement is available for review.

Following its submission, the EPA’s financial consultants will review the Financial Report (Cost Statement). If the Cost Statement receives a satisfactory review, it will be certified and details forwarded to the EPA\(^2\). The status of the Financial Report (Cost Statement) will change to **Cost Statement Certified**.

**Please note** that any payment due will only be processed if the Technical Progress Report for the corresponding period is also satisfactory.

Responding to Queries on a Financial Report (Cost Statement)

Should the EPA’s financial consultants identify any queries during the review that require resolution before the expenditure incurred for that reporting period can be certified, they will upload these in the field entitled Financial Queries.

**You are required to respond to the queries and resubmit the Cost Statement within 14 days of receiving the notification email.**

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\(^2\) Reimbursement payments are only made once certified expenditure on the project exceeds the amount of the advance payment made by the EPA.
1. You will be notified by email that queries need to be addressed before the Cost Statement can be certified. The status of the Financial Report (Cost Statement) for Cost Statements with queries will have changed to Revision Required as shown below:

![Image of Financial Report with Cost Statements]

2. On the Financial Report (Cost Statement) page, you should firstly view/download the queries related to the Cost Statement submitted for the period as shown below:

![Image of Financial Reports with Queries]

3. A response to the queries should then be prepared. Please note that where a project has more than one participating organisation you should forward the queries relating to that organisation to them, asking that they prepare and return their response to the queries to you within 14 days.

**IMPORTANT:** It is the responsibility of the Principal Investigator to collate and upload the response to all queries relating to the Cost Statement.

4. Upload the collated response to all queries and any supporting documentation by clicking on the Upload button in the field entitled Queries Response and Supporting Documents as shown below:

![Image of Financial Reports with Upload Button]

5. To ensure that all uploads are attached to the Financial Report (Cost Statement) page, you must click on the Save Draft button at the bottom of the page.
Save/Submit your revised Financial Report (Cost Statement)

Once you are satisfied that all relevant information has been included, the response to queries together with relevant supporting documentation should be submitted by clicking on the Submit button at the bottom of the page.

Clicking Submit will automatically change the status of the Financial Report (Cost Statement) from Revision Required to Submitted and notification emails will be sent.

The EPA’s financial consultants will review the response to the queries after receiving them. If all queries are resolved the Cost Statement will be certified and details forwarded to the EPA. The status of the Financial Report (Cost Statement) will change to Cost Statement Certified.

**Please note** that any payment due will only be processed if the Technical Progress Report for the corresponding period is also satisfactory.

Further Clarifications required on the Financial Report (Cost Statement)

If queries are still outstanding or further clarifications are required, the EPA’s financial consultants will upload these to the EPA’s Grant Management and Application Portal. You will again be notified by email that queries need to be addressed before the Cost Statement can be certified. The status of the Financial Report (Cost Statement) will have changed to Revision Required as detailed earlier.

To respond to the queries, repeat the steps described previously. The latest set of queries will appear in the list of uploaded documents under the Financial Queries upload field.

Certification & Approval of Financial Report (Cost Statements)

You will be notified by automated email once the EPA has approved your Financial Report (Cost Statement), and status of the activity will change to Approved.
Budget Reallocation Request Activity

If required, the Grantee can request a reallocation of funds between eligible budget categories and other project participants. Normally, the total reallocation between budget categories should not exceed 15% of the total project budget. The Grantee should ensure that the proposed reallocation is within the agreed budget. Budget reallocation requests will be considered on a case-by-case basis.

Create and Complete a Budget Reallocation Request

Log into the EPA’s Grant Management and Application Portal, scroll to the Live Grants section, locate the correct project in the list and click on the New Activity button at the end of the row:

The New Activity window will now open:

1. Select Budget Reallocation Request using the Create Activity drop-down list, then click on the Create button.
2. The new Budget Reallocation Request activity will now open on your screen:

3. All budget reallocation requests **must** be submitted using the standard template provided. Download the template by clicking on the hyperlink in the instructions field.

4. Complete the template and ensure it has been signed by the relevant person(s) within the organisation(s) before uploading it in **PDF format**.

**IMPORTANT:** It is the responsibility of the Principal Investigator to scan and convert all signed budget reallocation request templates to PDF prior to upload. It is also the responsibility of the Principal Investigator to upload the completed budget reallocation request template even if it relates exclusively to a project participant (partner organisation). Where the request relates to a reallocation between project participants (partners), separate templates (one per partner) should be completed, signed as appropriate, scanned, and converted to a single PDF document prior to upload.

**Saving/Submitting the Budget Reallocation Request**

1. You can save information you have entered on the Budget Reallocation Request by clicking the **Save Draft** button, and then return to it later to add additional information.

2. When you are satisfied that all relevant information has been included, the Budget Reallocation Request should be submitted by clicking on the **Submit** button at the bottom of the page.
3. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the budget reallocation request has been submitted successfully.
   b) The EPA Research Officer administering your project and the EPA’s financial consultants stating that the budget reallocation request is available for review.

Your budget reallocation request will now be reviewed. If it is approved, you will receive an auto-generated email confirming this and the status of the activity will change to Approved.

You will also be notified by email if the request is not approved or if further information/clarification is required before it can be approved. In circumstances where the budget reallocation request contains numerical errors, you will be asked to re-submit the request (instructions on how to do so are outlined in the following section). The status of your request will have changed to Revision Required.

Where justification for the request is insufficient, the request will be Rejected. In such circumstances, you may not re-submit the request using the same activity that has been rejected. You may, however, submit a new request with revised justification. To do so you will need to repeat the steps outlined in the Create a New Budget Reallocation Request section.

Revising the Budget Reallocation Request Following Review

If there are numerical errors in your budget re-allocation request, you will be required to revise your Budget Re-allocation Request Activity.

1. Log into the EPA’s Grant Management and Application Portal and scroll to the Live Grants section.

2. Select the Budget Reallocation Requests tab, locate the request in the list and click on the Open button.
3. You can view/download the queries on your budget re-allocation by clicking on the link in the Budget Re-allocation Queries section as shown below:

<table>
<thead>
<tr>
<th>Budget Re-allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please complete and upload the budget re-allocation template which is available by clicking the link below</td>
</tr>
<tr>
<td>Please note that the budget reallocation template, once completed, should be signed, scanned and uploaded as a single PDF document. Where a reallocation between project participants is being requested each participant will need to complete a reallocation form. These should then be signed, scanned and uploaded as a single PDF document.</td>
</tr>
<tr>
<td>Budget Re-allocation Form (PDF Only): Budget-reallocation-test.pdf</td>
</tr>
<tr>
<td>Upload Budget Re-allocation form (PDF Only)</td>
</tr>
<tr>
<td>Budget Re-allocation Queries</td>
</tr>
<tr>
<td>Budget-reallocation-queries-test.pdf</td>
</tr>
<tr>
<td>Revised Budget Re-allocation Form (PDF Only): Upload Revised Budget Reallocation (PDF Only)</td>
</tr>
</tbody>
</table>

4. You should ensure that the appropriate person makes the necessary revisions to the budget re-allocation request template.

5. You should also ensure that the revised budget re-allocation request is signed scanned and uploaded by clicking on the Upload Revised Budget Reallocation (PDF Only) button in the Revised Budget Re-allocation Form field as shown above.

6. Once the budget re-allocation form has been uploaded, click the Submit button at the bottom of the screen.

7. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the budget re-allocation request has been submitted successfully.
   b) The EPA Research Officer administering your project and the EPA’s financial consultants stating that the budget re-allocation request is available for review.

Your budget re-allocation request will now be reviewed. If it is approved, you will receive an auto-generated email confirming this and the status of the activity will change to Approved.

In circumstances where the budget re-allocation request contains numerical errors, you will be asked to re-submit the request and the status of your request will have changed to Revision Required. Instructions on how to re-submit the request are outlined above.
Project Time Extension Request Activity

In the event of a project encountering delays, it is the responsibility of the Grantee to request a time extension (at no extra cost) to the EPA as soon as it has become clear that the project will not be completed within the agreed timeframe. Requests for time extension will be considered on a case-by-case basis.

Create and Complete a Project Time Extension Request

Log into the EPA’s Grant Management and Application Portal, scroll to the **Live Grants** section, locate the correct project in the list and click on the **New Activity** button at the end of the row:

The **New Activity** window will now open:

1. Select **Project Time Extension Request** using the Create Activity drop-down list, then click on the **Create** button.
2. The new Project Time Extension Request activity will now open on your screen:

![Project Time Extension Request Activity](image)

3. Complete the text box entitled **Justification for Time Extension** (the justification should not exceed 200 words) and click the Save Draft button at the bottom of the page.

4. In the **Number of Months Requested** field, enter the number of months requested and click the Save Draft button.

5. All other fields will complete automatically when you click on the Save Draft button.

**Saving/Submitting the Project Time Extension Request**

1. You can save information you have entered on the Project Time Extension Request by clicking the **Save Draft** button, and then return to it later to add additional information.

2. When you are satisfied that all relevant information has been included, the Project Time Extension Request should be submitted by clicking on the **Submit** button at the bottom of the page.

3. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the request has been submitted successfully.
   b) The EPA Research Officer administering your project stating that the request is available for review.

Your Project Time Extension request will then be reviewed. You will receive an auto-generated email advising you of the outcome of this review. A reason will be provided in all instances where a request is not approved, and the status of the request will change from Submitted to Approved or Rejected.
Travel Outside the EU Request Activity

Create and Complete a Travel Outside the EU Request

Log into the EPA’s Grant Management and Application Portal, scroll to the Live Grants section, locate the correct project in the list and click on the New Activity button at the end of the row:

The New Activity window will now open:

![New Activity Window]

1. Select Travel Outside the EU Request using the Create Activity drop-down list, then click on the Create button.
2. The new Travel Outside the EU Request activity will now open on your screen:

![Travel Outside the EU Request Form]

3. Complete all the fields on the form and upload any supporting documentation, including papers to be presented, conference proceedings etc.

**Saving/Submitting the Travel Outside the EU Request**

1. You can save information you have entered on the Travel Outside the EU Request by clicking the **Save Draft** button, and then return to it later to add additional information.

2. When you are satisfied that all relevant information has been included, the Travel Outside the EU Request should be submitted by clicking on the **Submit** button at the bottom of the page.

3. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the request has been submitted successfully.
   b) The EPA Research Officer administering your project stating that the request is available for review.

Your Travel Outside the EU Request will now be reviewed. You will receive an auto-generated email advising you of the outcome of this review. A reason will be provided in all instances where a request is not approved, and the status of the request will change from Submitted to Approved or Rejected.
Meetings Activity

During the lifetime of the project you will be required to attend project progress meetings/Steering Committee meetings organised by the EPA Research Officer administering your project.

The EPA Research Officer will create a Meeting Activity on the EPA’s Grant Management and Application Portal and will notify you when this has been done.

This activity has two statuses:

1. Meeting – Planned
2. Meeting – Held

It allows for:

- The upload of agenda, presentations, and relevant documentation in advance of a meeting (at the Meeting – Planned status).
- The upload of minutes, comments and any other relevant documentation after the meeting has taken place (at the Meeting – Held status).

All attendees, who are registered users on the EPA’s Grant Management and Application Portal invited to the meeting by the EPA Research Officer (e.g. Principal Investigator, reviewers) have access to the meeting details, and can upload relevant documents as required.

View the Meetings activity

1. To view the Meetings activity, log on to the EPA’s Grant Management and Application Portal, scroll to the Live Grants section and click on the Meetings tab:

2. Locate the project for which you wish to view the Meetings activity, and click the Open button.

3. The Meeting activity form contains the project details and details of the:

   - Meeting Type
   - Meeting Agenda
   - Meeting Minutes
   - Related Documents
   - Meeting Date
   - Meeting Location
4. You can download the documents by clicking on the filename in the relevant field of the form.

Upload documents in the Meetings activity

1. To upload documents in the Meetings activity, click on the relevant upload button as shown in the previous image.

2. **Meeting Minutes field**: used when uploading Minutes or Comments on Minutes. Please ensure that your file is clearly labelled as several users will be uploading documents in this field. It is suggested you use the following format: *Name Minutes Meeting date*

3. **Related Documents field**: when uploading presentations or any other relevant documentation in advance of a meeting. Please ensure that your file is clearly labelled as several users will be uploading documents in this field. It is suggested you use the following format: *Name Type of document Meeting date*

Save your changes on the Meeting Activity

1. When you have uploaded the relevant documents, click the **Save Draft** button to ensure that all your uploaded documents are attached to the Meeting activity and click on the **Submit** button.

2. You can then close the Meeting activity.

**Please note** that currently there are no automated email notifications associated with the Meeting Activity. Please inform your EPA contact once you have amended a Meeting Activity.
Final Report Activities

The EPA requires the Principal Investigator to submit a draft Final Report to describe the objectives, methodologies, outcomes, etc. of the research.

NB: If the Final Report is longer than 75 pages, or less than 75 pages but is deemed to be highly technical, a non-technical draft Synthesis Report (20-30 pages) providing an overview of the work should also be submitted.

It is important that all team members agree and sign-off on the content of the reports prior to submission to the EPA. Both Final Reports and Synthesis Reports should be submitted by the end date of the project, following the Guidelines for Submission of Final Reports available from the EPA website (www.epa.ie).

The reports will be peer-reviewed and should be revised by the project team to address any comments/recommendations. The EPA will sign-off on the report(s), once satisfied with the contents.

This section describes the steps in relation to the submission and revision of:

- Final Reports (using the Final Report – Final Report Activity)
- Synthesis Reports (using the Final Report - Synthesis Report Activity)
- Policy Briefs (using the Final Report – Final Report Activity)

The following steps describe the submission and revision of a Final Report, and are applicable to all Final Report Activities, including Synthesis Reports and Policy Briefs.

Create and Complete a Final Report Activity

Log into the EPA’s Grant Management and Application Portal, scroll to the Live Grants section, locate the correct project in the list and click on the New Activity button at the end of the row:
The **New Activity** window will now open:

1. Select **Final Report** using the Create Activity drop-down list, then click on the **Create** button.

   **NB:** For Synthesis Reports, choose the Synthesis Report option

2. The new Final Report activity will now open on your screen:

3. Complete the Report Title and Report Authors fields

4. Upload the draft Final Report in **Word Format only** to the Upload Report field.

5. Under the Executive Summary section, upload the Executive Summary as a separate document in **Word Format only**.
Saving/Submitting the Final Report

1. You can save information you have entered on the Final Report activity by clicking the Save Draft button, and then return to it later to add additional information.

2. When you are satisfied that all relevant information has been included and the correct version of the draft report has been uploaded, the Final Report activity should be submitted by clicking on the Submit button at the bottom of the page.

3. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the report has been submitted successfully.
   b) The EPA Research Officer administering your project stating that the report is available for review.

4. Your Final Report will now be forwarded for review and the status will change from Submitted to Under Review:

5. You will receive auto-generated emails throughout the review process which will notify you when:
   a) Revision is required to the report
   b) The report has been approved and signed-off by the EPA

Revising the Final Report Following Review

When the review has been completed and revisions are required, you will receive an auto-generated email advising you to log on to the EPA’s Grant Management and Application Portal.

You will need to submit a revised Final Report within the next 21 days of receipt of this notification.

1. Log into the EPA’s Grant Management and Application Portal and scroll to the Live Grants section.

2. Select the Final Reports tab, locate the request in the list and click on the Open button.
3. When the activity opens, click on the **Review History** tab to access the detailed comments. The comments appear as hyperlinks and are grouped by Review Round number. Click on the hyperlinks to access the comments from each reviewer.

4. When you have completed your revisions, upload your revised report (and Executive Summary, if applicable) on the **General Tab**.

6. You can save information you have entered on the Final Report activity by clicking the **Save Draft** button, and then return to it later if necessary.
7. When you are satisfied that all relevant information has been included and the correct version of the draft report/executive summary has been uploaded, the Final Report activity should be submitted by clicking on the Submit button at the bottom of the page.

8. Clicking Submit will automatically change the status of the activity from Revision Required to Under Review and will trigger an email to:
   a) You, confirming that the report has been submitted successfully.
   b) The reviewers, stating that the revised report is available for review.

9. Your revised Final Report will automatically be forwarded for review and the status will change from Submitted to Under Review.

10. Once the revised report has been reviewed, you will receive an auto-generated email advising you that either further revision is required or that the report has been recommended for sign-off.

11. If the report requires further revision you will need to log on to the EPA’s Grant Management and Application Portal and repeat the above steps.

12. You will be notified by automated email once the EPA has approved your Final Report, and the status of the activity will change to Approved.
Event Feedback Form Activity

NB: this activity applies to Researcher Travel Support Grants and Event Support Grants only

To claim funding for a Researcher Travel Support Grant or Event Support Grant you will be required to submit a Misc. Event Feedback Form within 3 months of the travel or event taking place.

Create and Complete a Misc. Event Feedback Form Activity

Log into the EPA’s Grant Management and Application Portal, scroll to the Live Grants section, locate the correct project in the list and click on the New Activity button at the end of the row:

The New Activity window will now open:

1. Select Misc. Event Feedback Form using the Create Activity drop-down list, then click on the Create button.

2. The new activity will now open on your screen:

3. Complete all the fields as shown below in the Event Feedback Section:
   a) List of all other co-funders (Event Support Grant type only)
   b) Number of Participants (Event Support Grant type only), number of male participants, number of female participants
c) Summary of the event (200 words Max.)

d) Keynote Speakers (Names and Subjects (if applicable)) (Event Support Grant type only)

e) Highlights of the Event (position paper, awards, etc.)

f) Outline how this event will aid your research - 300 words max. (Researcher Travel Support Grant type only)

4. Upload additional information in the Additional Information Section:

Event Support Grant

Researcher Travel Support Grant
5. Upload your signed invoice (PDF format only) in the Payment Request Section:

![Payment Request](image)

6. Click the Save Draft button at the bottom of the form to refresh the activity and save your changes.

**Saving/Submitting the Misc. Event Feedback Form Activity**

1. You can save information you have entered on the Misc. Event Feedback Form by clicking the Save Draft button, and then return to it later to add additional information.

2. When you are satisfied that all relevant information has been included, the Misc. Event Feedback Form should be submitted by clicking on the Submit button at the bottom of the page.

3. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the Misc. Event Feedback Form has been submitted successfully.
   b) The EPA Research Officer administering your project stating that the form is available for review.

4. If the Misc. Event Feedback Form and Payment Request receives a satisfactory review, you will be notified by an auto-generated email. The status of the Misc. Event Feedback Form and Payment Request activity will change to Approved.

5. If the Misc. Event Feedback Form and Payment Request is not approved, you will be notified by an auto-generated email. The status of the Misc. Event Feedback Form and Payment Request activity will change to Rejected.

**Revising the Misc. Event Feedback Form and Payment Request Activity**

If the Misc. Event Feedback Form and Payment Request receives an unsatisfactory review, you will be notified by an email outlining the revisions required. The status of the Misc. Event Feedback Form and Payment Request activity will change to Draft. You can access and revise the activity by repeating the earlier steps.
Maternity/Paternity/Adoptive Leave Request Activity

Create and Complete a Maternity/Paternity/Adoptive Leave Request

Log into the EPA’s Grant Management and Application Portal, scroll to the Live Grants section, locate the correct project in the list and click on the New Activity button at the end of the row:

The New Activity window will now open:

1. Select Maternity/Paternity/Adoptive Leave Request using the Create Activity drop-down list, then click on the Create button.

2. The new Maternity/Paternity/Adoptive Leave Request activity will now open on your screen.

NB: All fields on this activity are compulsory and must be completed.

3. In the Maternity/Paternity/Adoptive Leave section complete the following:
   - Type of leave requested (drop-down box)
   - Dates of leave (from and to)
   - Name of person applying for leave
4. In the social welfare benefit section, different fields will appear depending on the option chosen:

**TIP:** hover over the question mark symbol (?) at the end of each field to view additional instructions and information regarding the details required for the field.

If **No** is selected:
If Yes is selected:

5. Upload all required supporting documentation at the bottom of the page — refer to the instructions above the upload field for guidance on the requirements. **All uploads must be in PDF format.**

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**Saving/Submitting the Maternity/Paternity/Adoptive Leave Request**

1. You can save information you have entered on the Maternity/Paternity/Adoptive Leave Request by clicking the **Save Draft** button, and then return to it later to add additional information.

2. When you are satisfied that all relevant information has been included, the Maternity/Paternity/Adoptive Leave Request should be submitted by clicking on the **Submit** button at the bottom of the page.

3. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
   a) You, confirming that the budget reallocation request has been submitted successfully.
   b) The EPA’s financial consultants stating that the request is available for review.
The Maternity/Paternity/Adoptive Leave Request will now be reviewed. Depending on the outcome of the review, the status will be updated as follows:

- **Approved** - the request is approved and no further action is required
- **Revision Required** - clarifications are required
- **Rejected** - the request has been rejected. You cannot re-submit the request using the same activity that has been rejected, however you may submit a new request.

### Revising the Maternity/Paternity/Adoptive Leave Request Following Review

If clarifications are required, you will need to revise the Maternity/Paternity/Adoptive Leave Request.

1. Log into the EPA’s Grant Management and Application Portal and scroll to the **Live Grants** section.
2. Select the **Maternity/Paternity/Adoptive Leave Request** tab, locate the request in the list and click on the **Open** button.
3. Details of the required revisions/clarifications will be shown in the text box at the bottom of the screen:
4. You can edit previously completed fields and upload additional supporting documentation.
5. When you are satisfied that all clarifications have been addressed, the request should be submitted by clicking on the **Resubmit** button at the bottom of the page.

   - Clicking Resubmit will automatically change the status of the activity from Revision Required to Submitted and will trigger an email to:
   - a) You, confirming that the budget reallocation request has been submitted successfully.
   - b) The EPA’s financial consultants stating that the request is available for review.

The Request will now be reviewed and you will be notified of the outcome by automated email.