EPA Research Programme 2014 – 2020

EPA’s Online Grant Management and Application Portal – User Guide for Evaluators & Reviewers

Revised April 2019
EPA Research Programme 2014-2020

EPA’s Online Grant Management and Application Portal – User Guide for Evaluators & Reviewers

Introduction

This document is a guide for evaluators and reviewers using the EPA Grant Management and Application Portal. It describes the functionality and interfaces of the portal to evaluators and reviewers evaluating proposals, reviewing reports and participating in steering committees for 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 Call Terms and Conditions for Support of Grant Awards
2. EPA Research Call Guide for Applicants
3. EPA Research Call Guide for Grantees
4. EPA Research Call Technical Description Documents
5. EPA’s Grant Management and Application Portal – Registration & General User Notes

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

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 Management and Application Portal, some functions will appear not to work because the associated pop-up windows cannot be displayed.

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.
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Evaluator Functions – Overview

The purpose of the evaluation process is to ensure that all proposals are assessed in a fair and transparent manner, and that the best and most suitable proposals are selected for funding.

Proposals are assigned to evaluators following a preliminary general eligibility/suitability check carried out by the EPA Research Team. Proposals are evaluated based on the scientific and technical quality, as well as relevance to environmental research needs and priorities.

IMPORTANT: Proposals and evaluations must not be circulated outside of the EPA Grant Management and Application Portal under any circumstances.

Relevant Documentation

Before you begin the process of evaluating the proposal(s) assigned to you, please read the relevant call documentation, which can be found on the EPA website (www.epa.ie) or by clicking on the Guides link in the header bar when logged into the EPA Grant Management and Application Portal.

These documents include:

- The applicable Technical Description for the call for proposals
- The applicable Terms & Conditions document
- EPA Research Guide for Applicants
- EPA Research Guide for Grantees

Video Tutorial for Evaluators

For further guidance and a demonstration of the evaluation process please refer to the Evaluators Guide Video Tutorial, which can be accessed via the Video Tutorials link in the header bar at the top of the screen when you are logged into the Portal.

Evaluation Steps

You will receive an auto-generated email from donotreply.epa@smartsimple.ie for each proposal that has been assigned to you for evaluation. The evaluation process includes several steps:

1. Completing the Declaration of Confidentiality and Conflict of Interest
2. Reviewing the proposal
3. Completing the Evaluation Form
4. Consensus (via email or phone) where required
**Evaluation Criteria**

Applications are assessed using pre-defined evaluation criteria.

Evaluation criteria and weightings may be revised periodically, therefore it is essential to refer to the description and marks available on the online Evaluation Form and Call documentation.

**Project-based Award Proposals**

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Total Marks Available</th>
<th>% of Overall Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literature Review</td>
<td>100</td>
<td>10%</td>
</tr>
<tr>
<td>Pressures, Policy, Solutions</td>
<td>150</td>
<td>15%</td>
</tr>
<tr>
<td>Objectives, targets and impacts, detailed work-packages, risk and contingencies</td>
<td>300</td>
<td>30%</td>
</tr>
<tr>
<td>Communication</td>
<td>150</td>
<td>15%</td>
</tr>
<tr>
<td>Project management and project team</td>
<td>150</td>
<td>15%</td>
</tr>
<tr>
<td>Appropriateness of resource allocation</td>
<td>150</td>
<td>15%</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td><strong>1,000</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

**Research Fellowships Proposals**

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Total Marks Available</th>
<th>% of Overall Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literature Review. Pressures, Policy, Solutions</td>
<td>200</td>
<td>20%</td>
</tr>
<tr>
<td>Objectives and targets, detailed work-packages, risk and contingencies</td>
<td>300</td>
<td>30%</td>
</tr>
<tr>
<td>Academic background, work experience and training</td>
<td>200</td>
<td>20%</td>
</tr>
<tr>
<td>Communication</td>
<td>100</td>
<td>10%</td>
</tr>
<tr>
<td>Project management and project team</td>
<td>150</td>
<td>15%</td>
</tr>
<tr>
<td>Appropriateness of Resource Allocation</td>
<td>50</td>
<td>5%</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td><strong>1,000</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
Green Enterprise Programme Proposals

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Total Marks Available</th>
<th>% of Overall Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Quality: objectives, approaches and work packages</td>
<td>300</td>
<td>30%</td>
</tr>
<tr>
<td>Relevance to the call topic areas and to the principles of the Green Enterprise programme</td>
<td>200</td>
<td>20%</td>
</tr>
<tr>
<td>Scalability for widespread implementation and/or transferability potential across sectors</td>
<td>200</td>
<td>20%</td>
</tr>
<tr>
<td>Technical expertise and project management capability of the team</td>
<td>200</td>
<td>20%</td>
</tr>
<tr>
<td>Costing and value for money</td>
<td>100</td>
<td>10%</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td><strong>1,000</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Rating System

Proposals should address at least one of the topic areas in the Technical Description Document and are marked on a scale of 0 to 1,000. The ratings available for each evaluation criterion are as follows:

<table>
<thead>
<tr>
<th>Option</th>
<th>Score (% of Marks Available)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor</td>
<td>&lt;20%</td>
<td>The criterion is inadequately addressed or there are serious inherent weaknesses</td>
</tr>
<tr>
<td>Fair</td>
<td>20% - 39%</td>
<td>The proposal broadly addresses the criterion but there are significant weaknesses</td>
</tr>
<tr>
<td>Good</td>
<td>40% - 59%</td>
<td>The proposal addressed the criterion well but with several shortcomings</td>
</tr>
<tr>
<td>Very Good</td>
<td>60% - 79%</td>
<td>The proposal addresses the criterion very well but with a small number of shortcomings</td>
</tr>
<tr>
<td>Excellent</td>
<td>80% - 100%</td>
<td>The proposal successfully addresses all relevant aspects of the criterion, any shortcomings are minor</td>
</tr>
</tbody>
</table>

Thresholds

To proceed to the second stage of the evaluation process and be considered for funding, proposals must:

- Achieve a minimum average of 40% in each evaluation criterion (i.e. average across all individual evaluation forms)
- Achieve a minimum average total score of 700\(^1\)/1,000 marks (i.e. average based on the overall total score from all individual evaluation forms)

\(^1\) For proposals submitted under the Green Enterprise Programme a minimum average total score of 590 must be achieved.
Evaluators Section

When you first Log into the EPA Grant Management and Application Portal you will see your Home page. Click on the **My Evaluations** link in header bar at the top of the screen to access the Evaluators section:
The following page will then be displayed – locate the **My Evaluations section**. The **Conflicts of Interest tab** will be selected by default:

![Image of the EPA Research platform showing the My Evaluations section with the Conflicts of Interest tab highlighted.](image)

**Instructions**

Complete the following steps below for each proposal to which you have been assigned to.

- **Step 1 Conflicts of Interest**: Read and complete the Declaration of Confidentiality and Conflict of Interest Form in the "Conflicts of Interest" section.
- **Step 2 Create New Evaluation**: Click on "View" and view the proposals to which you have been assigned to. Click on "Create Evaluation" to access and complete your Evaluation Form for each.
- **Step 3 Draft Evaluations**: View and Edit your Draft Evaluation Forms for each proposal.
- **Step 4 Submitted Evaluations**: View and print your completed Evaluation Forms for each proposal to which you have been assigned to.

**NEW** – video tutorials are available. Click on the link in the top right-hand corner of the header bar.

**My Evaluations**

**CONFLICTS OF INTEREST**

<table>
<thead>
<tr>
<th>Application</th>
<th>Applicant</th>
<th>Institution</th>
<th>Confidentiality and Conflict Form</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>STRIVE - Project Based Awards</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>Sent for Evaluation</td>
</tr>
<tr>
<td>STRIVE - Project Based Awards</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>Sent for Evaluation</td>
</tr>
</tbody>
</table>
Declaration of Confidentiality and Conflict of Interest

Before you can begin evaluating a proposal you must complete the Confidentiality and Conflict of Interest form.

Scroll to the My Evaluations section and select the Conflicts of Interest tab. You will see a list of proposals for which you have yet to complete a conflict of interest declaration.

Open and complete the Confidentiality and Conflict of Interest form for each proposal assigned to you by clicking on the Details button:

Details of the proposal, including the name of the project coordinator and participants, a short summary of the proposed research, and the expected outputs of the project will now open in a new pop-up window:

- **CONFLICT OF INTEREST**
  
  Please tick where appropriate:

  **NO CONFLICT**
  
  [ ] I declare that I have not submitted, nor am I, to my knowledge, directly or indirectly involved in any proposal submitted for evaluation under the EPA Research Programmes 2014-2020.

  **POTENTIAL CONFLICT**
  
  [ ] I declare that my participation in the evaluation of the following proposal(s) could create either a direct or an indirect conflict of interest.

  If in conflict, provide details of your reason why there is a conflict of interest.

- **DECLARATION OF CONFIDENTIALITY**
  
  [ ] I will inform the EPA if I have collaborated with the proposal participants within the last four years or acted as their or post-doctoral supervisor of any of the researchers. (If you believe that you could nevertheless provide an objective review despite previous collaborations or current collaborations on other topics, please state this above.)

  [ ] I understand that if I discover any conflict of interest, direct or indirect, with any proposal that I am asked to evaluate or which is the subject of discussion in any evaluation meeting at which I am present.

  Name:  
  Date:  
  Email:  
  Save
Complete the declaration by ticking the appropriate boxes. If you have identified a conflict, please provide details in the Reason for Conflict of Interest text box.

**NB:** Your name, the date and your email address will complete automatically when you save and submit the form.

**CONFLICT DECLARED:** If you declare a Conflict of Interest in relation to a proposal, you will not be able to complete the evaluation and the details of the proposal will be removed from your workbench. If you are in doubt as to whether you have a conflict of interest, please consult your EPA Research contact before completing the form.

When you click on the **Save button** the following pop-up message will appear – click on the **OK button** to clear the message:

*Declaration of Conflict of Interest & Confidentiality successfully submitted - You have now full visibility of the applications for review. Please close the Conflict of Interest & Confidentiality form. To view the proposal & complete your evaluation form, please check the Application Type & click on the relevant Icon in the portal.*

**Creating and Completing the Evaluation Form**

Having completed the Declaration of Confidentiality and Conflict of Interest form, you can now access the full proposal by clicking on the **Create New Evaluation tab** in the My Evaluations section. Clicking on the **View button** will open a new window displaying details of the proposal which can be downloaded in PDF format:
IMPORTANT: Proposal details can be downloaded for off-line use, but must not be circulated outside of the EPA Grant Management and Application Portal under any circumstances.

To begin the evaluation, click on the Create Evaluation button at the end of the row:
This will open the **Evaluation Activity** - the project details and your own details appear in top sections of the form under the headings Project and Evaluator Details, as seen in the example below.

Please note that this form is NOT viewable by the applicant at any stage of the process.

As an alternative to the PDF download of the proposal details, you can use the **Options** button to enable **Split Screen mode** – this will enable you to view the proposal details on the left-hand side of the screen whilst completing the Evaluation Form on the right-hand side of the screen.

To enable Split Screen mode, click on the Options button and select **Show Grant**: 

![Split Screen Mode Image](image-url)
Your view will now change to the Split Screen mode:

1) **Proposal Details**: Click on the **Project Tab** to view full details of the proposal, access the Project Description Document and the Budget Details – use the scroll bar (1) to move up and down through the proposal details.

2) **Evaluation Form**: use the scroll bar (2) to move to each of the evaluation criteria, complete your comments and select the rating.
To close the Split Screen mode, click on the options button and select Hide Grant from the drop-down list – your view will then return to the single screen mode showing the Evaluation Form only:

Scroll down through the Evaluation Form to view and complete each of the evaluation criteria. An explanation of the ratings is given under the heading Description. For each criteria you will need to:

a) Add your comments (maximum of 100 words)

b) Choose a rating by selecting from the options available in the drop-down box

Click the Save Draft button regularly at the bottom of the evaluation form to ensure that the information entered is saved.
Each time you click on Save Draft the view will default to the **General Tab**. To continue completing the Evaluation Form click on the **Activity tab**:

![Activity Tab](image)

When you have entered your comments under each criterion you will need to complete the **Overall Comments** text box in the summary section which is located towards the bottom of the form – this box is compulsory and **limited to 200 words**.

The comments in this section will form the basis of the feedback provided to the applicant. The comments recorded must give sufficient and clear reasons for the marks and, if appropriate, any recommendation for modifications to the proposal should it be retained for negotiation. Comments should address all evaluation criteria (the example in the following image relates to Project Based Awards).
The **Recommendation** and **Comment** fields will auto-populate when the form has been submitted, and will be based on the rating selected for each criterion.

**Saving and Submitting the Evaluation Form**

You can save the information you have entered on the Evaluation Form as often as necessary prior to submission by clicking the **Save Draft** button.

If you need to exit the evaluation form before it has been fully completed you can return to your draft form by clicking on the **Draft Evaluations tab** in the **My Evaluations section**. This tab will display a list of Evaluation Forms which you have started but not yet completed and submitted – click on the **Open** button at the end of the row to return to your draft Evaluation Form:

When you are satisfied that the Evaluation Form is fully completed, click on the **Submit** button at the bottom of the form.
All text fields and drop-down boxes on the Evaluation Form are compulsory and must be completed – if you have not completed a field or selected a rating for each criterion, one of the following warning messages will appear:

![Warning Message](image)

Clicking on the OK button will close the message – the field or drop-down box which needs to be completed will now be highlighted on the evaluation form:

![Highlighted Field](image)

When the form has been fully completed, clicking on the Submit button will generate a confirmation message to notify you the form was successfully submitted. To continue evaluating any further proposals click on the My Evaluations link in the header bar and repeat the steps above:

![Submit Button](image)

**View your submitted Evaluation Forms**

You can view the list of your submitted evaluations by scrolling to the My Evaluations section and selecting the Submitted Evaluations tab.

You can no longer edit the evaluation, however you can view details by clicking on the Print Form button at the end of the row:

![Print Form Button](image)
Reviewer Functions – Overview

Grantees are required to submit reports throughout the lifetime of the project, and on completion of the project. These reports are reviewed and feedback is provided to Grantees as applicable. The reports which are available on the Reviewer portal are as follows:

Technical Progress Reports (TPRs): TPRs are interim progress reports which are submitted twice yearly and which should clearly detail the technical progress of the project. Any difficulties arising should also be reported together with the actions planned to overcome these difficulties.

Final Reports: The EPA requires the principal investigator to submit a draft Final Report to describe the objectives, methodologies, outcomes, etc. of the research.

Synthesis Reports: If the Final Report is longer than 75 pages or deemed to be highly technical, a draft Synthesis Report (20-30 pages), providing an overview of the work may also be required.

Policy Briefs: On completion of a project a policy brief will be prepared by the principal investigator, which will be used to disseminate the findings of the research with key stakeholders.

Reports (both interim and final) are assigned to reviewers with technical expertise/knowledge of the project for comment and feedback to the author(s). The review process for all reports is conducted using the EPA Grant Management and Application Portal.

**IMPORTANT:** Reports and reviews must not be circulated outside of the EPA Grant Management and Application Portal under any circumstances.

Relevant Documentation

When reviewing a report that has been assigned to you, it may be useful refer to the following documentation which can be found on the EPA website (www.epa.ie):

- The Technical Description for the relevant call for proposals
- The relevant Terms & Conditions document:
  - Terms and Conditions of Grant Awards for Projects
  - Terms and Conditions of Grant Awards for Projects for Doctoral Scholarships
  - Terms and Conditions of Grant Awards for Projects for Masters Scholarships
  - Terms and Conditions of Grant Awards for Projects for the Green Enterprise Programme
- EPA Research Guide for Applicants
- EPA Research Guide for Grantees

For further guidance and a demonstration of the final report review process please refer to the Lead Review Video Tutorial and the Additional Reviewer Video Tutorials, which can be accessed via the Video Tutorials link in the header bar at the top of the screen.
Reviewers Section

To access the Reviewers section, log on to the EPA Grant Management and Application Portal and click on the My Reviews link in the header bar at the top of the screen:
The following page will be displayed:

This page contains the following sections:

1. Instructions
2. My Pending Reviews
3. My Submitted Reviews
4. Ongoing Reviews for Lead Reviewer (NB: this section is relevant to Lead (Primary) Reviewers of Final Reports only)
Technical Progress Reports (TPRs)

Technical Progress Reports (TPRs) for Project Based Awards and Research Fellowships are due on the 28th of January and 28th of July each year during the lifetime of a project (Please note: TPR submission for Scholarships are due on the 1st of October annually).

You will receive an auto-generated email for each Technical Progress Report that has been assigned to you for review.

Log into the EPA Grant Management and Application Portal, select the My Reviews link in the header bar, scroll to the My Pending Reviews section and click on the Technical Progress Reports (TPR) tab (NB: if you have been assigned to review a Dissemination Technical Progress Report, click on the Dissemination Report (TPR) tab):

To begin the review process, click on the Open button at the end of the row. This will open the TPR Activity:
Reviewing the TPR

You can use the Options button to enable Split Screen mode—this will enable you to view the project details on the left-hand side of the screen whilst completing the TPR review on the right-hand side of the screen. To enable Split Screen mode, click on the Options button and select Show Grant—your view will now appear as follows:

1) Proposal Details: Click on the Project Tab to view full details of the proposal and access the Project Description Document - use the scroll bar (1) to move up and down through the proposal details.

2) TPR Form: use the scroll bar (2) to review the TPR
To close the Split Screen mode, click on the Options button and select **Hide Grant** from the drop-down list – your view will then return to the single screen mode showing the TPR Form only:

The Technical Progress Report activity includes the following sections:

- **Activity** – this section displays the type of TPR and the status
- **Project** – this section includes a link to download the TPR sign-off form, and displays brief details of the project
- **Technical Progress Report (TPR)** – includes a link to the Technical Progress Report Document and the overall statement regarding progress
- **Communication** – displays details of communication activities for the reporting period
- **Project Team Details** – records all members of the project team
- **Events/Conferences and Workshops** – displays details of events held by the project team
- **Report on Physical Indicators** – details papers, presentations, posters etc. and research products produced by the project
- **Funding Leverage & Linkages** – contains details of leveraged funding and/or established linkages with other partners in Ireland (e.g. SMEs, MNCs, Local Authorities, Academic Institutions, Agencies)

**IMPORTANT**: TPR details can be downloaded for off-line use, but **must not** be circulated outside of the EPA Grant Management and Application Portal under any circumstances.

**Commenting on Progress**

Having reviewed the TPR, you should complete the online sign-off form and comment on the progress of the project by filling in the appropriate fields in the following sections (the text boxes in these sections are compulsory and must be completed):

- **Technical Review section**
  - Have work packages been completed in accordance with the project proposal?
  - Is the Literature review (where relevant) complete?
• **Timescale Section:**
  - Have major milestones been achieved?
  - Have objectives been met?
  - Have there been any delays with the project?

• **Project Management Section**
  - Did the research team have a team meeting during the reporting period?

• **Overall Assessment Section**
  - Outline any concerns you may have over progress
  - Future Actions

• **Dissemination/Publicity**
  - Opportunities for dissemination that you may be aware of.

When you have finished entering your comments on the review form, complete the **Reviewer Sign Off section** at the bottom on the TPR activity page. Select the appropriate option from the dropdown menu available in the field entitled Reviewer Signed Off:

If the TPR is **satisfactory** and you want to recommend its sign-off, select the Yes option in the dropdown menu.

If the TPR is **not satisfactory** and should be revised, choose the No option. You will be presented with a text box entitled Please Provide Justification (as seen below), which then needs to be completed.

**NB:** the contents of this text box will not be visible to the Grantee.
Saving & Submitting the Technical Progress Report Review

You can save the information you have entered on the online sign-off form as often as necessary prior to submission, by using the Save Draft button at the bottom of the form. You can return to a saved TPR review by scrolling to the My Pending Reviews section, selecting the Technical Progress Reports (TPR) tab, and clicking on the Open button at the end of the row.

Once you have completed the review and are satisfied with its content, click the Submit button. The following confirmation window will appear:

![Hey Alice]

Once submitted, the status of the activity will change from Under Review to Submitted and an auto generated email will be sent to the EPA Research Officer administering the project stating that the review has been submitted.

Reviewing a Revised Technical Progress Report

In instances where revision is required, you will be informed by an auto-generated email that the revised TPR has been submitted and awaits your review.

To review the revised TPR, repeat the earlier steps – you can amend and, where necessary, delete your initial comments on the sign-off form. Your original review will have been previously exported as a PDF and saved by the EPA Research Officer administering the project.
Final Reports

The EPA requires the project coordinator to submit a draft Final Report to describe the objectives, methodologies, outcomes, etc. of the research. If this report exceeds 75 pages or is deemed to be highly technical, a draft Synthesis Report (20-30 pages), providing an overview of the work may also be required.

Both 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). For Research Fellowship projects, the EPA requires the project coordinator to submit a State of Knowledge Report on Month 8 of the fellowship project.

This section describes the steps in relation to the review of:

- Final Reports
- Synthesis Reports
- Policy Briefs

These will be referred to as Final Report activities in the following guidance.

The review process includes:

- Review of the draft report
- Upload of detailed review comments
- Review of revised report
- Completion of the Sign Off form

You will receive an auto-generated email for each report that has been assigned to you for review.

**IMPORTANT**: Final reports and reviews can be downloaded for off-line use, but must not be circulated outside of the EPA Grant Management and Application Portal under any circumstances.
Reviewing the Final Report

The instructions in this section relate to all final report reviewers. If you have been assigned as the Lead (Primary) reviewer you will also need to refer to the Lead Reviewer section in this document.

Log into the EPA Grant Management and Application Portal, click on the My Reviews link in the header bar, scroll to the My Pending Reviews section and click on the Final Reports tab (NB: if you were assigned to review a final report before 03/08/2018 you will need to select the Final and Synthesis Reports tab):

To begin the review process, click on the Open button at the end of the row. This will open the Final Report Review Activity:

1) If you have been assigned as the Lead (Primary) reviewer you will also need to refer to the Lead Reviewer section in this document.

2) The names of additional reviewers and the status of their reviews is displayed at the top of this activity.
Scroll to the **Final Report Details section** to download the draft final report and executive summary by clicking on the hyperlinks:

The reports are attached in Word format. Add your recommendations using tracked changes and comments made within the report, then scroll to the **Reviewers Comments section** to:

1) Upload your detailed review to the field indicated at 1
2) Select your recommendation using the drop-down box indicated at 2 (either Revision Required or Sign Off)
3) Submit your review by clicking on the button indicated at 3
Saving & Submitting the Final Report Review

You can save the information you have entered on the online review form as often as necessary prior to submission, by using the Save Draft button at the bottom of the form.

Once you have completed the review and are satisfied with its content, make your recommendation and click the Submit Review button. The following confirmation message will now appear on your screen – to clear the message click on the Return to Workbench button:

You have successfully submitted your completed form.

You will also receive an automated email notification like the following example:

Once submitted, the status of the activity will change from Under Review to Review Submitted.

Lead Reviewer Actions

The instructions in this section relate to Lead (Primary) Reviewers only.

When all reviewers have submitted their reviews, you will receive an automated email notification like the following example:

Log into the EPA Grant Management and Application Portal, click on the My Reviews link in the header bar, scroll to the Ongoing Reviews for Lead Reviewers section, locate the report in the list and click on the Open button at the end of the row:
The recommendation made by each reviewer will be displayed at the top of the page:

![Image of Ongoing Reviews for Lead Reviewer]

Scroll to the **Reviewers Comments section** to access the detailed comments made by the other reviewers. Click on the hyperlinks to download the comments:

![Image of Reviewers Comments]

**Round 1:**
- Alice Tickband:
  - Alice_Review_1.docx
- Bart Endor:
  - Bart_Review_1.docx
After taking the recommendations of the other reviewers into consideration you can either:

a) **Request revision** of the report by adding comments to the Lead Reviewer Comments field (3) and clicking on the Request Revision button (4)

b) **Recommend approval** and sign off the report by downloading and completing the Final Report Sign Off form (1), uploading it to the activity (2) and clicking on the Submit for Approval button (4)

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### Reviewing a Revised Final Report

**The instructions in this section relate to all final report reviewers.**

When the authors have completed the revisions requested by the reviewers you will receive an automated notification advising you the revised report is ready for review:

Log into the EPA Grant Management and Application Portal, click on the **My Reviews link** in the header bar, scroll to the **My Pending Reviews section** click on the **Final Reports tab**, locate the report in the list and click on the **Open** button:

The revised version of the final report and executive summary can be downloaded by clicking on the hyperlinks in the **Final Report Details section** on the **General tab**.
To view the comments made by other reviewers on the previous version of the report, select the **Review History** tab and click on the hyperlinks to open the documents:

<table>
<thead>
<tr>
<th>Round 1:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alice Ted; Alice Review 1.docx</td>
<td></td>
</tr>
<tr>
<td>Bart. End; Bart Review 1.docx</td>
<td></td>
</tr>
</tbody>
</table>

To view previous versions of the report, select the **Report Upload History** tab. Each version of the report and the corresponding review comments are grouped by **Review Round number**—this enables you to identify which comments refer to which version of the report:

<table>
<thead>
<tr>
<th>Round 1:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Final_report_1.docx</td>
<td>41.7 KB - 07/09/2019 19:26</td>
</tr>
<tr>
<td>Executive Summary</td>
<td></td>
</tr>
<tr>
<td>Executive_Summary_1.docx</td>
<td>11.4 KB - 07/03/2019 19:26</td>
</tr>
<tr>
<td>Executive_Summary_2.docx</td>
<td>15.2 KB - 07/03/2019 20:30</td>
</tr>
</tbody>
</table>

Return to the **General** tab to submit your detailed comments on the revised version of the final report using the process outlined under the **Reviewing the Final Report section** of this document.
Meeting Functions - Overview

The EPA, in consultation with the Grantee and, where applicable, Co-Funding organisations, will establish a steering committee to provide advice to the research team and the EPA on the overall direction and approach of the project and to provide an external view of the research. The steering committee will also advise on the contents and structure of the final report.

The principal investigator and project participants will be required to attend six-monthly steering committee meetings, and present results from their research. These meetings will be organized by the EPA and the principal investigator.

If you are a member of a project Steering Committee you can use the EPA Grant Management and Application Portal to:

- View meeting details (date, time, location)
- View details of the project (by enabling Split Screen mode)
- Download the meeting agenda and other meeting documentation
- Download the minutes of meeting
- Upload meeting documentation

**IMPORTANT:** Meeting documents and minutes can be downloaded for off-line use, but **must not** be circulated outside of the EPA Grant Management and Application Portal **under any circumstances.**
Meetings List

To view a list of meetings to which you have been assigned, log on to the EPA Grant Management and Application Portal and click on the Meetings link in header bar at the top of the screen:
The following page will then be displayed – the list view of your assigned meetings will include the following information:

1. Project code
2. Meeting Status
3. Meeting date
4. Meeting location
5. Meeting title

To access details of a meeting, click on the Open button at the end of the row.

NB: If you have been asked to attend a meeting but are unable to see details, you may not have been assigned to the project and/or meeting activity – contact the EPA Research Project Manager if this is the case.
Meeting Details

The meeting activity will now open on the General tab. To view details, click on the Activity tab:

At the top of the Activity tab you will see summary details of the project, including the title, lead organisation and the name of the project coordinator:
The lower half of the form includes the following:

1. Meeting agenda (displayed as a hyperlink)
2. Related meeting documents (displayed as hyperlinks)
3. Meeting date
4. Start Time
5. Meeting Location

The following table lists the functions available to you, depending on the status of the meeting activity:

<table>
<thead>
<tr>
<th>Activity Status</th>
<th>Functions Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting Planned</td>
<td><strong>You can:</strong></td>
</tr>
<tr>
<td></td>
<td>1. View the meeting details</td>
</tr>
<tr>
<td></td>
<td>2. Download the agenda</td>
</tr>
<tr>
<td></td>
<td>3. Download related documents</td>
</tr>
<tr>
<td></td>
<td>4. Upload an agenda</td>
</tr>
<tr>
<td></td>
<td>5. Upload related documents</td>
</tr>
<tr>
<td>Meeting Held</td>
<td><strong>You can:</strong></td>
</tr>
<tr>
<td></td>
<td>1. View the meeting details</td>
</tr>
<tr>
<td></td>
<td>2. Download the agenda and meeting minutes</td>
</tr>
<tr>
<td></td>
<td>3. Download related documents</td>
</tr>
<tr>
<td></td>
<td>4. Upload related documents</td>
</tr>
</tbody>
</table>
Viewing the Project

You can use the **Options button** at the top of the form to enable **Split Screen** mode—this will enable you to view the project details on the left-hand side of the screen whilst accessing the meeting details and documentation on the right-hand side. To enable Split Screen mode, click on the Options button and select **Show Grant**—your view will now appear as follows:

1. **Project Details**: Click on the Project Tab to view full details of the proposal and access the Project Description Document - use the scroll bar (1) to move up and down through the proposal details.

2. **Meeting Activity**: use the scroll bar (2) to view the meeting details and documentation

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