

Environmental Protection Agency  
An Ghníomhaireacht um Chaomhnú Comhshaoil



# EPA's Grant Management System User Guide for Evaluators, Reviewers & Steering Committee Members

Updated January 2022

# EPA's Grant Management System

## User Guide for Evaluators, Reviewers & Steering Committee Members

### Introduction

This document is a guide for Evaluators, Reviewers and Steering Committee Members using the EPA's Grant Management & Application System (System) and describes the functionality and interfaces of the System. The system can be accessed using the following link:

[https://epa.smartsimple.ie/s\\_Login.jsp](https://epa.smartsimple.ie/s_Login.jsp)

**Please read this document carefully prior to using the system.**

You will need to refer to the following documentation which is available to download from the System, or from the [Call Documents page on the EPA Website](#):

1. EPA Research Call (YYYY) Technical Description Document
2. EPA Research Programme 2020-2021 Guidelines and Terms & Conditions
3. EPA Research Programme 2020-2021 Evaluation Process

### Enabling Pop-ups

Please ensure that your browser settings permit pop-ups from the website address displayed by the System.

**IMPORTANT:** If you do not enable pop-ups when logged on to the system some functions will appear not to work because the associated pop-up windows cannot be displayed.

### More Information

For further information and assistance with using the System, please contact: [research@epa.ie](mailto: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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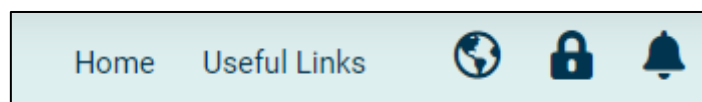
## Your Home Page

When you first Log into the system you will see your Home page which includes the following:

### Header Bar

The header bar includes the following links:

1. **Home** – clicking on this from anywhere in the system will bring you back to your Home page
2. **Useful Links** – clicking on this will take you to a new page that includes links to template that are available on the EPA website, including Evaluator/Reviewer invoice templates.



### Home Page

1. **Information** – this section includes links to the call documents and user guides
2. **Items for Action** – this section includes links to items that have been assigned to you for review or evaluation, and (Steering Committee Members only) meetings that you have been invited to attend but have not yet taken place.
3. **Completed Items** – this section includes items that you have completed, and (Steering Committee Members only) meetings that you were invited to attend that have already taken place and a list of approved reports and deliverables.

**Information**
1

Call Documents

System Guides

Frequently Asked Questions

**Items for Action**
2

0
Reviews Pending Action

0
Evaluations Pending Action

1
Planned Meetings

**Completed Items**
3

4
Completed Reviews

0
Completed Evaluations

1
Held Meetings

1
Approved Reports & Deliverables

## EVALUATOR FUNCTIONS

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 system under any circumstances.

## Relevant Documentation

Before you begin the process of evaluation of the proposal(s) assigned to you, please read the relevant call documentation which can be found on the EPA website ([www.epa.ie](http://www.epa.ie)) or by clicking on the Call Documents button located in the Information section on your homepage when you are logged into the system.

## Evaluation Steps

You will receive an automated notification from [donotreply.epa@smartsimple.ie](mailto:donotreply.epa@smartsimple.ie) for each proposal that has been assigned to you for evaluation. The evaluation process includes several steps:

1. Completing the Evaluator Declaration in relation to confidentiality and conflict of interest (required for each proposal that you have been assigned to evaluate)
2. Reviewing the proposal
3. Completing and submitting the Evaluation Form
4. Consensus (via email or telephone) where required

## Evaluation Criteria

Applications are assessed using pre-defined 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.

## 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 3,000. The ratings available for each evaluation criterion are available on the online evaluation form.

## Thresholds

To proceed to the second stage of the evaluation process proposals must achieve a minimum average score across each evaluation criterion and achieve a minimum total score – please refer to the EPA Research Programme 2021-2030 Evaluation Process document for details.

## Evaluation Forms

To begin an evaluation, click on the Evaluations Pending Action button located in the Items for Action section. A list of the proposals that have been assigned to you to evaluate will be displayed on screen:

Evaluations Pending Action							
<b>Status = Conflict Check:</b> Please complete the declaration of No Conflict (click on the Open button to access the declaration). <b>Status = Draft:</b> You have completed the No Conflict declaration and can now evaluate the proposal (click on the Open button to complete the evaluation).							
<input type="text"/>							
	#	Status	Evaluation Type	Grant Type	Project/Proposal Number	Principal Investigator	Organisation
<a href="#">Open</a>	1	Conflict Check	Evaluation Form	Project Based Award	1099	Jack Russell	EPA Research Test Organisation

The status of each evaluation is displayed in the first column. The statuses are explained as follows:

Status	Explanation
Conflict Check	You need to complete the Evaluator Declaration (click on the Open button to access the declaration).
Draft	You have completed the Evaluator Declaration and can now evaluate the proposal if no conflict has been indicated (click on the Open button to complete the evaluation).

## Completing the Evaluator Declaration

Prior to completing the Evaluator Declaration, the following information will be available to you on the General tab of the evaluation form:

1. Name of the lead applicant
2. Name of the lead organisation
3. Name of any co-applicants and their organisation

1099 - Evaluation Form

GENERAL
EVALUATOR DECLARATION

Proposal Number: 1099
Project Code: 1099
Lead Applicant: Jack Russell
Lead Organisation: EPA Research Test Organisation
Print Preview: [Print Preview](#)

Type: Evaluation Form
Activity Status: Conflict Check
Created By: 
Created Date: 12/07/2021 12:58
Last Updated: 12/07/2021 12:58

Project

Project Title: Demonstration Project
Grant Type: Project Based Award
Call Documentation: [Technical Descriptions\\_May2021.pdf](#)

Lead Applicant & Co-applicants

Role on Project	Name	
Lead Applicant	Jack Russell	EPA Research Test Organisation
Co-applicant (IE/NI Organisation)	Alice Tickband	EPA Research Test Organisation
Co-applicant (IE/NI Organisation)	Holly Dayin	EPA Research Test Organisation
Co-applicant (Non-IE/NI Organisation)	Joe King	EPA Research TEST UK Organisation

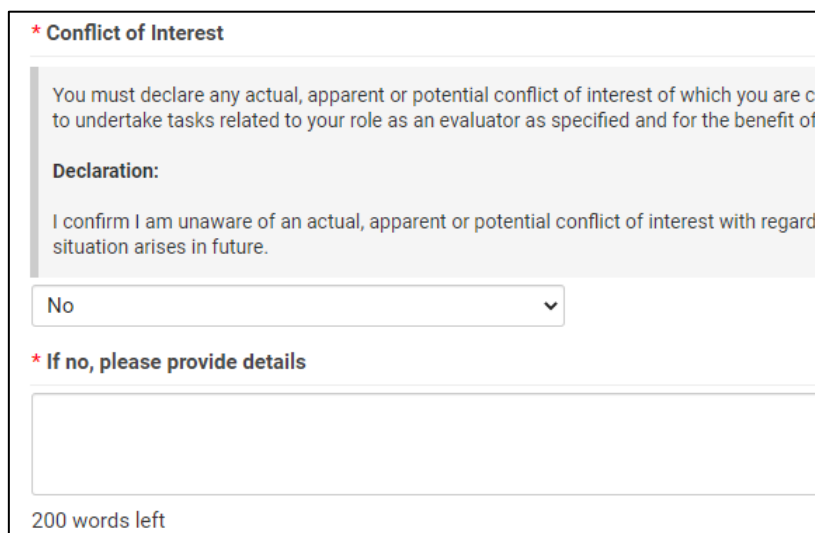
To complete the declaration, click on the Evaluator Declaration tab and answer the following questions which are detailed on the form:

1. Understanding of Requirements
2. Conflict of Interest
3. Unconscious Bias

**Please note:** the proposal details will not be available to you unless you are able to answer Yes to all of the above questions and confirm no conflict exists.

## Declare a Potential Conflict

If you are aware of a potential conflict of interest, please select No to question 2, provide a brief explanation in the text field, and click on the Declare Conflict button at the bottom of the screen:



The screenshot shows a web form titled '\* Conflict of Interest'. It contains a paragraph stating: 'You must declare any actual, apparent or potential conflict of interest of which you are currently aware or which may arise in the future in order to undertake tasks related to your role as an evaluator as specified and for the benefit of the public.' Below this is a 'Declaration:' section with the text: 'I confirm I am unaware of an actual, apparent or potential conflict of interest with regard to the application and no conflict of interest situation arises in future.' There is a dropdown menu with 'No' selected. Below the dropdown is another section titled '\* If no, please provide details' with a large text input area. At the bottom left of the form, it says '200 words left'.

The following confirmation message will now appear on screen:

### Submission Successful

You have declared a potential conflict against the application. The EPA will review the reason and will advise you of their decision in due course.

Following EPA review of the reason for the potential conflict you will be notified of one of the following:

1. The EPA has confirmed a conflict does exist and you will not be required to review the proposal
2. The EPA are satisfied no conflict exists and you may continue with your evaluation of the proposal



## Opening the Evaluation Form

There are two ways to open the evaluation:

1. If you have declared No Conflict Exists, you can begin completing the evaluation by clicking on the Open Form button included in the confirmation message:

**Submission Successful**

No conflict declared against this application. Please click Open Form button below to begin the evaluation.

[Open Form](#)

2. Or, if preferred, you can first complete the Evaluator Declarations for each proposal assigned to you and then proceed to complete the evaluations for each one. If you are using this method, click on the Evaluations Pending Action button located in the Items for Action section to open a list of the proposals that are ready to be evaluated (the status will be Draft):

Evaluations Pending Action							
Status = Conflict Check: Please complete the declaration of No Conflict (click on the Open button to access the declaration).							
Status = Draft: You have completed the No Conflict declaration and can now evaluate the proposal (click on the Open button to complete the evaluation).							
<input type="text"/>							
#	Status	Evaluation Type	Grant Type	Project/Proposal Number	Principal Investigator	Organisation	
<a href="#" style="background-color: #0070c0; color: white; padding: 2px 5px; text-decoration: none;">Open</a>	1 Draft	Evaluation Form	Project Based Award	1099	Jack Russell	EPA Research Test Organisation	

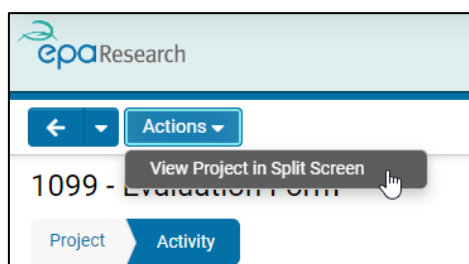
You can save a partially completed evaluation form at any point by clicking on the Save Draft button at the bottom of the screen.

## View the Proposal Details

There are two ways to view the proposal details:

### Option 1: View the Proposal in Split Screen

With the evaluation form open, click on the Actions button in the top left-hand corner (beneath the EPA Research logo) and select View Project in Split Screen:



Your view will now change to Split Screen mode, with the proposal details visible on the left-hand side and the evaluation form visible on the right-hand side:

Clicking on each tab of the proposal will provide you with access to view the details entered by the applicant and the uploaded Project Description document (located at the bottom of the Project Scope tab). Use the scroll bar (1) to see all information, or close the split screen by clicking on the X (2)

The evaluation form can be completed by clicking on the appropriate tab on the right-hand side of the screen.

## Option 2: View a PDF of the Proposal

With the evaluation form open, scroll to the bottom of the General tab, locate the View Application PDF field below the Lead Applicant & Co-applicants table, and click on the Print Preview button:

Lead Applicant & Co-applicants	
	Role on Project
Lead Applicant	
Co-applicant (IE/Ni Organisation)	
Co-applicant (IE/Ni Organisation)	
Co-applicant (Non-IE/Ni Organisation)	

View Application PDF: [Print Preview](#)

This will generate a PDF copy of the completed online fields and the uploaded Project Description document.

## Proposal Budgets

Evaluators are not required to complete a review the of the budgets submitted with the proposal therefore only the following information will be available on the Budget Details tab:

1. Total Cost of Project Requested
2. Total Grant Aid Requested

## Complete the Ratings and Comments

With the evaluation open, click on the Evaluation tab:

**1099 - Evaluation Form**

Project Activity

GENERAL EVALUATOR DECLARATION **EVALUATION** OVERALL COMMENTS AND RECOMMENDATIONS

**Rating System**

0% - Fail	The proposal fails to address the criterion or cannot be assessed due to missing or inc
20% - Poor	The criterion is inadequately addressed, or there are serious inherent weaknesses.
40% - Fair	The proposal broadly addresses the criterion, but there are significant weaknesses.
60% - Good	The proposal addresses the criterion well, but a number of shortcomings are present.

The rating system will be displayed at the top of the tab and each criterion is explained on the form. You will need to complete comments and select a rating for each individual criterion. Click on Save Draft to save your comments and ratings.

**Criterion: Excellence**

When evaluating under this criterion please consider the following:

- Clarity and pertinence of the objectives
- Soundness of the concept, and credibility of the proposed methodology
- Relevance to the Call Technical Description
- Extent that the proposed work is beyond the state of the art, and demonstrates in
- Appropriate consideration of interdisciplinary approaches and, where relevant, us

**\* Observations for this criterion and justification for score**

Enter your comments here

246 words left

**\* Rating**

When you have added your comments and ratings, click on the Overall Comments and Recommendations tab to add comments under each of the following headings:

1. Overall Strengths
2. Overall Weaknesses
3. Overall Possible Improvements

**IMPORTANT:** 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 awarded and if, appropriate, any recommendations for modifications to the proposal, should the proposal be retained for negotiation. The comments provided here should cover all of the evaluation criteria.

The screenshot shows the '1099 - Evaluation Form' interface. At the top, there are tabs for 'Project' and 'Activity', with 'Activity' being the active tab. Below these are four main sections: 'GENERAL', 'EVALUATOR DECLARATION', 'EVALUATION', and 'OVERALL COMMENTS AND RECOMMENDATIONS'. The 'OVERALL COMMENTS AND RECOMMENDATIONS' section is highlighted with a red box. Below this section, there is a text area for 'Overall Strengths'.

You can save your form at any point by clicking on the Save Draft button at the bottom of the screen.

## Submitting the Evaluation

When you are satisfied with the ratings and comments you have entered you will need to submit your evaluation to the EPA by clicking on the Submit button at the bottom of the form. Forms must be fully completed before they can be submitted – if you have inadvertently forgotten to complete a rating or text field a warning will appear at the top of the screen (see example below) – clicking on the reason for the error will take you directly to the field that needs to be completed:

The screenshot shows the '1099 - Evaluation Form' interface with a red error message at the top: 'Submission failed due to the following:'. Below this message, there is a list of errors: 'Rating cannot be empty'. A mouse cursor is pointing at the text 'Rating cannot be empty'.

When the fully completed form has been submitted, a notification will appear on your screen:

The screenshot shows a notification box with the title 'Submission Successful' and the message 'The evaluation form has been submitted.'.

To complete additional evaluations, click on the Home link in the top right-hand corner of your screen beneath your name:

The screenshot shows the top navigation bar of the application. It includes links for 'My Profile', 'English (US)', 'Privacy & Security', and 'Mona Lott'. A red arrow points to the 'Home' link in the top right-hand corner.

## National Overview Pre-Scoring Forms

To begin completing a National Overview Pre-Scoring Form, click on the Evaluations Pending Action button located in the Items for Action section. A list of the proposals that have been assigned to you to pre-score will be displayed on screen:

Evaluations Pending Action						
Status = Conflict Check: Please complete the declaration of No Conflict (click on the Open button to access the declaration).						
Status = Draft: You have completed the No Conflict declaration and can now evaluate the proposal (click on the Open button to complete the evaluation).						
#	Status	Evaluation Type	Grant Type	Project/Proposal Number	Principal Investigator	
1	Conflict Check	National Overview Pre-scoring Form	Project Based Award	1022	Jack Russell	<a href="#">Open</a>

The status of each evaluation is displayed in the first column. The statuses are explained as follows:

Status	Explanation
Conflict Check	You need to complete the Evaluator Declaration (click on the Open button to access the declaration).
Draft	You have completed the Evaluator Declaration and can now evaluate the proposal if no conflict has been indicated (click on the Open button to complete the evaluation).

## Completing the Evaluator Declaration

Prior to completing the Evaluator Declaration, the following information will be available to you on the General tab of the evaluation form:

1. Name of the lead applicant
2. Name of the lead organisation
3. Name of any co-applicants and their organisation

1022 - National Overview Pre-Scoring Form

GENERAL EVALUATOR DECLARATION

Proposal Number: 1022  
 Project Code: 1022  
 Lead Applicant: Jack Russell  
 Lead Organisation: EPA Research Test Organisation  
 Print Preview: [Print Preview](#)

Type: National Overview Pre-scoring Form  
 Activity Status: Conflict Check  
 Created By: Lisa Cullimore  
 Created Date: 13/07/2021 08:28  
 Last Updated: 13/07/2021 08:28

▼ Project

Project Title: Test Project - for demonstration purposes only  
 Grant Type: Project Based Award  
 Call Documentation: [Technical Descriptions May2021.pdf](#)

Lead Applicant & Co-applicants

Role on Project	Name	
Lead Applicant	Jack Russell	EPA Research Test Organisation
Co-applicant (IE/NI Organisation)	Holly Dayin	EPA Research Test Organisation
Co-applicant (IE/NI Organisation)	Alice Tickband	EPA Research Test Organisation

To complete the declaration, click on the Evaluator Declaration tab and answer the following questions which are detailed on the form:

1. Understanding of Requirements
2. Conflict of Interest
3. Unconscious Bias

**Please note:** the proposal details will not be available to you unless you are able to answer Yes to all of the above questions and confirm no conflict exists.

## Declare a Potential Conflict

If you are aware of a potential conflict of interest, please select No to question 2, provide a brief explanation in the text field, and click on the Declare Conflict button at the bottom of the screen:

**\* Conflict of Interest**

You must declare any actual, apparent or potential conflict of interest of which you are aware in order to undertake tasks related to your role as an evaluator as specified and for the benefit of the public.

**Declaration:**

I confirm I am unaware of an actual, apparent or potential conflict of interest with regard to the application and no situation arises in future.

**\* If no, please provide details**

200 words left

The following confirmation message will now appear on screen:

### Submission Successful

You have declared a potential conflict against the application. The EPA will review the reason and will advise you of their decision in due course.

Following EPA review of the reason for the potential conflict you will be notified of one of the following:

1. The EPA has confirmed a conflict does exist and you will not be required to review the proposal
2. The EPA are satisfied no conflict exists and you may continue with your evaluation of the proposal

## Opening the Pre-Scoring Form

There are two ways to open the Pre-Scoring form:

1. If you have declared No Conflict Exists, you can begin completing the form by clicking on the Open Form button included in the confirmation message:

**Submission Successful**

No conflict declared against this application. Please click Open Form button below to begin the evaluation.

Open Form

2. Or, if preferred, you can first complete the Evaluator Declarations for each proposal assigned to you and then proceed to complete the form for each one. If you are using this method, click on the Evaluations Pending Action button located in the Items for Action section to open a list of the proposals that are ready to be evaluated (the status will be Draft):

Evaluations Pending Action						
<p><b>Status = Conflict Check:</b> Please complete the declaration of No Conflict (click on the Open button to access the declaration).</p> <p><b>Status = Draft:</b> You have completed the No Conflict declaration and can now evaluate the proposal (click on the Open button).</p>						
	#	Status	Evaluation Type	Grant Type	Project/Proposal Number	Principal Investigator
Open	1	Draft	National Overview Pre-scoring Form	Project Based Award	1022	Jack Russell

You can save a partially completed form at any point by clicking on the Save Draft button at the bottom of the screen.

## View the Proposal Details

There are two ways to view the proposal details:

### Option 1: View the Proposal in Split Screen

With the evaluation form open, click on the Actions button in the top left-hand corner (beneath the EPA Research logo) and select View Project in Split Screen:

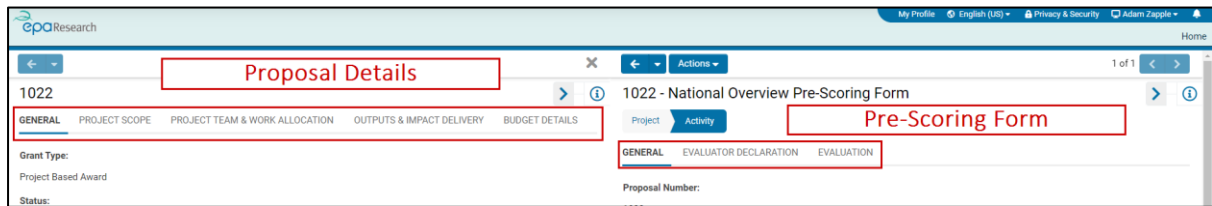
epaResearch

← Actions

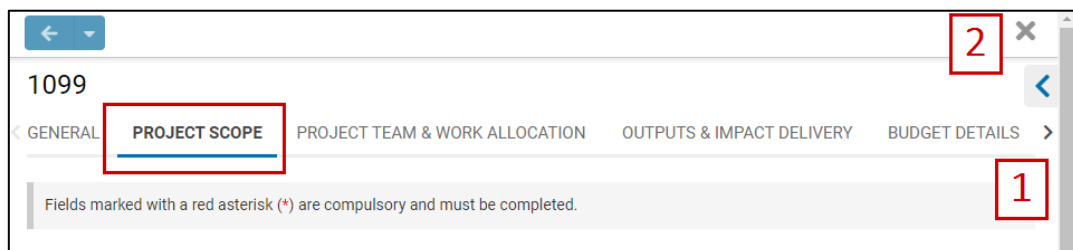
1022 - National Overview Pre-Scoring Form

GENERAL EVALUATOR DECLARATION EVALUATION

Your view will now change to Split Screen mode, with the proposal details visible on the left-hand side and the evaluation form visible on the right-hand side:



Clicking on each tab of the proposal will provide you with access to view the details entered by the applicant and the uploaded Project Description document (located at the bottom of the Project Scope tab). Use the scroll bar (1) to see all information, or close the split screen by clicking on the X (2)



The evaluation form can be completed by clicking on the appropriate tab on the right-hand side of the screen.

## Option 2: View a PDF of the Proposal

With the evaluation form open, scroll to the bottom of the General tab, locate the View Application PDF field below the Lead Applicant & Co-applicants table, and click on the Print Preview button:

Lead Applicant & Co-applicants	
	Role on Project
Lead Applicant	
Co-applicant (IE/Ni Organisation)	
Co-applicant (IE/Ni Organisation)	
Co-applicant (Non-IE/Ni Organisation)	

View Application PDF: [Print Preview](#)

This will generate a PDF copy of the completed online fields and the uploaded Project Description document.

## Proposal Budgets

Evaluators are not required to complete a review of the budgets submitted with the proposal therefore only the following information will be available on the Budget Details tab:

1. Total Cost of Project Requested
2. Total Grant Aid Requested



## Complete the Rating and Comment

With the form open, click on the Evaluation tab:

1022 - National Overview Pre-Scoring Form

Project Activity

GENERAL EVALUATOR DECLARATION **EVALUATION**

**Evaluators Feedback From Round 1**

**Evaluator 1 Feedback**  
Overall Strengths

This is what 500 words looks like, the text here is for demonstration purposes only and can be deleted at any point. This is what 500 words looks like, the text here is for demonstration purposes only and can be deleted at any point. This is what 500 words looks like, the text here is for demonstration purposes only and can be deleted at any point.

Overall Weaknesses

A summary of the feedback from the Round 1 evaluators will be displayed at the top of the page.

Below the Round 1 feedback, the rating system and the criterion will be explained on the form. You will need to complete the comments field and select a rating for the proposal. Click on Save Draft to save your comments and ratings.

**Rating System**

0 - Fail	The proposal fails to address the criterion or cannot be assessed
1 - Poor	The criterion is inadequately addressed, or there are serious weaknesses
2 - Fair	The proposal broadly addresses the criterion, but there are significant weaknesses
3 - Good	The proposal addresses the criterion well, but a number of weaknesses remain
4 - Very Good	The proposal addresses the criterion very well, but a small number of weaknesses remain
5 - Excellent	The proposal successfully addresses all relevant aspects of the criterion

**Criterion: National Overview**

Please assess the added value, expected impacts and knowledge transfer of the proposed research

1. Abstract for Publication
2. Expected Outputs
3. Impact Statement
4. Knowledge Transfer

**\* Observations for this criterion and justification for score**

200 words left

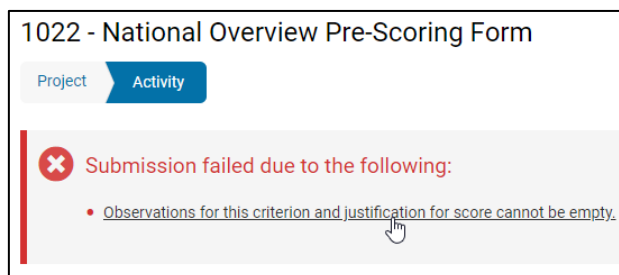
**\* Rating**

**IMPORTANT:** The comments entered here will be used to form the basis of the feedback provided to the applicant. The comments recorded must give sufficient and clear reasons for the score and if, appropriate, any recommendations for modifications to the proposal, should the proposal be retained for negotiation.

You can save your form at any point by clicking on the Save Draft button at the bottom of the screen.

## Submitting the Pre-Scoring Form

When you are satisfied with the rating and comments you have entered you will need to submit the form to the EPA by clicking on the Submit button at the bottom of the page. The form must be fully completed before it can be submitted – if you have inadvertently forgotten to complete the rating or text field a warning will appear at the top of the screen (see example below) – clicking on the reason for the error will take you directly to the field that needs to be completed:



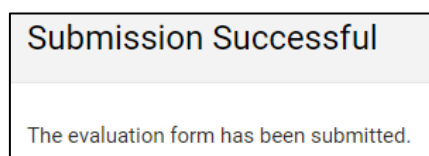
1022 - National Overview Pre-Scoring Form

Project Activity

**Submission failed due to the following:**

- Observations for this criterion and justification for score cannot be empty.

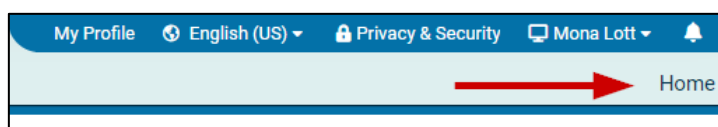
When the fully completed form has been submitted, a notification will appear on your screen:



**Submission Successful**

The evaluation form has been submitted.

To complete additional Pre-Scoring forms, click on the Home link in the top right-hand corner of your screen beneath your name:



My Profile English (US) Privacy & Security Mona Lott

Home

## REVIEWER FUNCTIONS

Grantees are required to submit deliverables throughout the lifetime of the project<sup>1</sup>, and on completion of the project. These deliverables may require panel review and feedback will be provided to Grantees as applicable.

The types of deliverables that may require panel review include (but are not limited to):

- EPA Research Reports
- Technical Reports
- Project Synthesis Reports
- Policy Briefs
- Literature Reviews (for publication as an EPA Research Report)
- Interim Reports (e.g. feasibility study/scoping study)
- Best Practice Guides

Where applicable, deliverables (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 deliverables is conducted using the EPA Grant Management and Application System.

**IMPORTANT:** Deliverables and reviews **must not** be circulated outside of the system under any circumstances.

## Relevant Documentation

When reviewing a deliverable that has been assigned to you, it may be useful refer to the following documentation that can be found on the EPA website ([www.epa.ie](http://www.epa.ie)), or downloaded from the Information section on your home screen when you are logged into the system:

1. EPA Research Call (YYYY) Technical Description Document
2. EPA Research Programme 2021-2030 Guidelines and Terms & Conditions

## Review Forms

You will receive an automated notification from [donotreply.epa@smartsimple.ie](mailto:donotreply.epa@smartsimple.ie) when a deliverable has been assigned to you for review. To begin the review, log into the system and click on the Reviews Pending Action button in the Items for Action section:

Items for Action		
<div>1</div> <div>Reviews Pending Action</div>	<div>1</div> <div>Evaluations Pending Action</div>	<div>1</div> <div>Planned Meetings</div>

<sup>1</sup> Depending on the requirements of the project

This will open a list of any deliverables that are awaiting your review:

Reviews Pending Action								
<div> <input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/> 1-1 of 1 </div>								
	#	Proposal Number	Lead Applicant	Lead Organisation	Activity Type	Deliverable Type	Title	Status
<input type="button" value="Open"/>	1	2021-NE-1009	Jack Russell	EPA Research Test Organisation	Deliverables Review	Interim Report (e.g. Feasibility/Scoping study)	Interim Report Demonstration	Draft

Open the deliverable you wish to review. The review form contains the following sections:

## General

This section contains basic information about the project.

## Details

This section includes

1. The project title
2. A link to open a PDF of the project details
3. The review round number
4. The deliverable type
5. A link to download the document for review
6. A link to download the response document (available from review round 2 onwards)

Details

Project Title: Test Project - for demonstration purposes only

Project PDF:

Review Round: 1

Deliverable Type: Interim Report (e.g. Feasibility/Scoping study)

Deliverable Title: Interim Report Demonstration

Deliverable for Review:

Final\_report\_1.docx

41.7 KB - 13/07/2021 09:28

Response Document (for Revised Deliverables):

## Reviewer Comments

When you have completed your review, you will use this section to upload your detailed comments document and select your recommendation:

Reviewer Comments

\* Reviewer Detailed Comments:

\* Recommendation:

Download the document for review by clicking on the hyperlink. Save a copy of the document to your computer, then add your recommendations/suggestions as tracked changes and/or comments on the document and ensure you save a copy that includes your recommendations/suggestions.

1. Upload the version of the document that includes your recommendations/suggestions
2. Select your recommendation
3. Submit your review

## Complete the Review – Subsequent Rounds

## Previous Round Reviews

Details

Project Title:

Enhancing public engagement in the SEA process: Developing criteria for use in SEA implementation

Project PDF:

Open

Review Round:

2



Previous Round Reviews:

Round	Reviewer	Recommendation	Reviewer Detailed Comments
1	Crystal Ball	Sign Off	<a href="#">Crystal Ball Review 1.docx</a>
1	Adam Zapple	Revisions Required	<a href="#">Adam Zapple Review 1.docx</a>
1	Mona Lott	Revisions Required	<a href="#">Mona Lott Review 1.docx</a>

## Revised Report and Response Document

Below the review summary table, you will find the following (please note, depending on the size of the screen that you are viewing the activity on, you may need to scroll down the page to view the fields):

1. The latest version of the report for review (1)
  - This version should incorporate the comments and revisions suggested in the previous round.
2. A response document (2)
  - For any revised version of the Deliverable Report or Paper the applicant should upload a response document that details how the review points have been addressed. Where review comments and recommendations have not been incorporated justification must be provided.

<b>Deliverable Type:</b>	Interim Report (e.g. Feasibility/Scoping study)	
<b>Deliverable Title:</b>	Test Report Title	
<b>Deliverable for Review:</b>	<div>  <a href="#">Final_report_2.docx</a> <b>1</b>  <small>41.7 KB - 20/07/2021 07:37</small> </div>	
<b>Response Document (for Revised Deliverables):</b>	<div>  <a href="#">Response_Document_1.docx</a> <b>2</b>  <small>11.4 KB - 20/07/2021 07:37</small> </div>	

Download the document for review and the response document by clicking on the hyperlinks. Save a copy of the revised report to your computer, then add your recommendations/suggestions as tracked changes and/or comments on the document and ensure you save a copy that includes your recommendations/suggestions.

Return to the review form and scroll to the Reviewer Comments section to:

1. Upload the version of the document that includes your recommendations/suggestions
2. Select your recommendation
3. Submit your review

## STEERING COMMITTEE FUNCTIONS

If you are a member of a project Steering Committee (SC) you can use the EPA Grants Management System to access meeting details and view approved reports and deliverables.

### Meetings

You have access to:

1. View meeting details (date, time, location)
2. Download the agenda and other related documents
3. View details of the project (by enabling Split Screen mode)
4. Upload meeting documentation
5. Download the minutes of the meeting

**IMPORTANT:** Meeting documents and minutes can be downloaded for off-line use but **must not** be circulated outside of the EPA Grants Management System **under any circumstances**.

You will have access to view meeting details, related documents and project details providing:

1. You are a current SC member on the project
2. You were/have been invited to the meeting

**Please note** – you will not have access to meetings that took place prior to your commencement as an SC member on the project.

You can view details of meetings that have not yet been completed by clicking on the Planned Meetings button in your Items for Action section, and details of past meetings can be accessed by clicking on the Held Meetings button in your Completed Items section:

Items for Action			
0 Reviews Pending Action	0 Evaluations Pending Action	1 Planned Meetings	
Completed Items			
4 Completed Reviews	0 Completed Evaluations	1 Held Meetings	1 Approved Reports & Deliverables

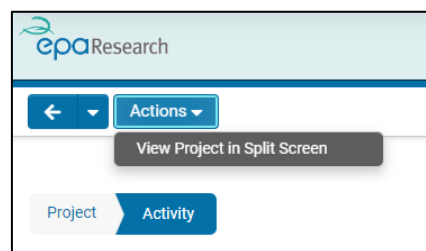
## Meeting Details

Click on either the Planned Meetings button or the Held Meetings button (as applicable) to open a list of items. To view the full details, the related documents and the agenda, click on the Open button:

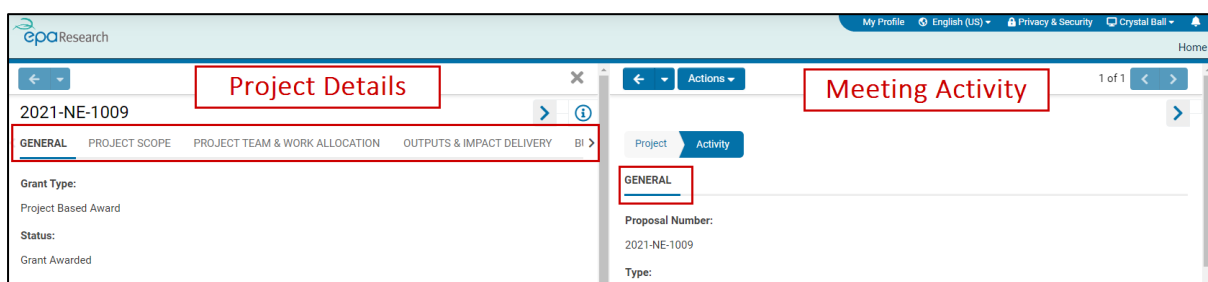
Planned Meetings								
						1-1 of 1		
#	Project Number	Lead Applicant	Lead Organisation	Type	Title	Start Date and Time	Meeting Status	
Open	1	2021-NE-1009	Jack Russell	EPA Research Test Organisation	Steering Committee Meeting	SC Meeting No. 1	20/07/2021 11:00	Meeting Planned

## Project Details

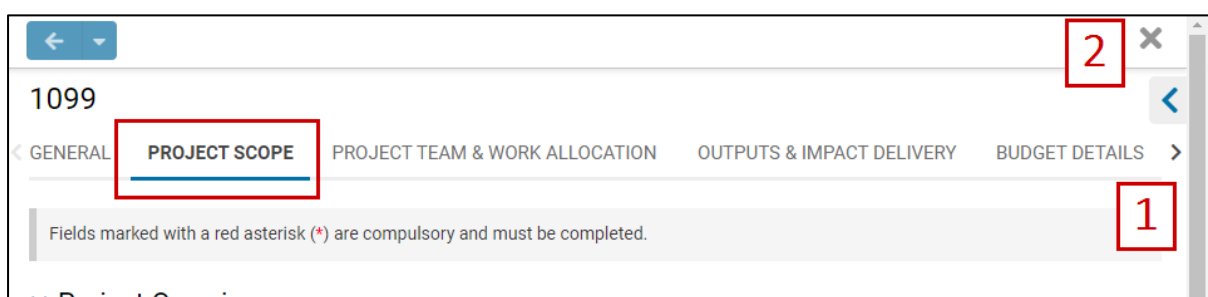
With the meeting activity open, click on the Actions button in the top left-hand corner (beneath the EPA Research logo) and select View Project in Split Screen:



Your view will now change to Split Screen mode, with the project details visible on the left-hand side and the meeting activity visible on the right-hand side:



Clicking on each tab of the project will provide you with access to view the details entered by the applicant and the uploaded Project Description document (located at the bottom of the Project Scope tab). Use the scroll bar (1) to see all information, or close the split screen by clicking on the X (2)





## Approved Reports & Deliverables

When the review process has been completed and the item has been approved you will have access to:

1. View approved Project Progress Reports
2. View approved Deliverables (interim and final)
3. View details of the project (by enabling Split Screen mode)

**IMPORTANT:** Reports and Deliverables can be downloaded for off-line use but **must not** be circulated outside of the EPA Grants Management System **under any circumstances**.

You will have access to view approved Reports and Deliverables providing

1. You are a current SC member on the project
2. The Report or Deliverable was approved after you were assigned as a current SC member on the project

**Please note** – you will not have access to Reports and Deliverables that were approved prior to your commencement as an SC member on the project.

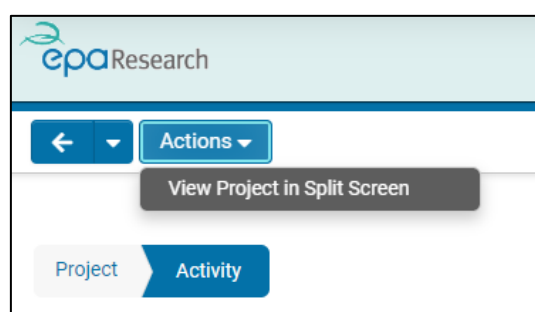
## Approved Items

Click on Approved Reports & Deliverables button (to open a list of items. To view the full details, click on the Open button:

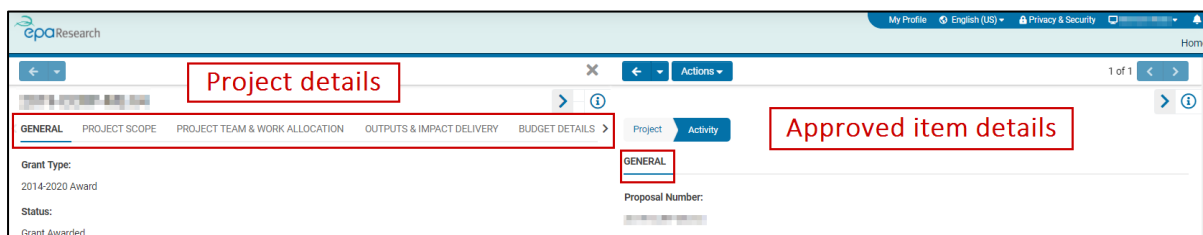
Approved Reports & Deliverables											
#	Project Number	Lead Applicant	Lead Organisation	Project Title	Grant Status	Activity Type	Deliverable Type	Report Number	Period To	Activity Status	
View	1				Grant Awarded	Deliverables – Reports & Papers				Approved	

## Project Details

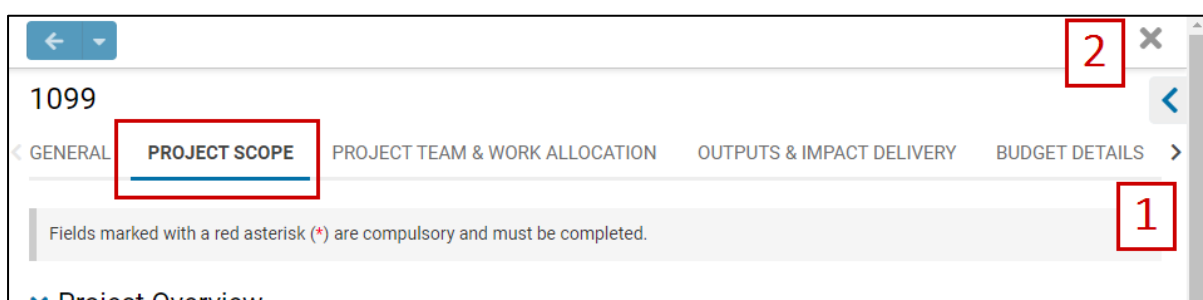
With the approved item open, click on the Actions button in the top left-hand corner (beneath the EPA Research logo) and select View Project in Split Screen:



Your view will now change to Split Screen mode, with the project details visible on the left-hand side and the approved item visible on the right-hand side:



Clicking on each tab of the project will provide you with access to view the details entered by the applicant and the uploaded Project Description document (located at the bottom of the Project Scope tab). Use the scroll bar (1) to see all information, or close the split screen by clicking on the X (2)

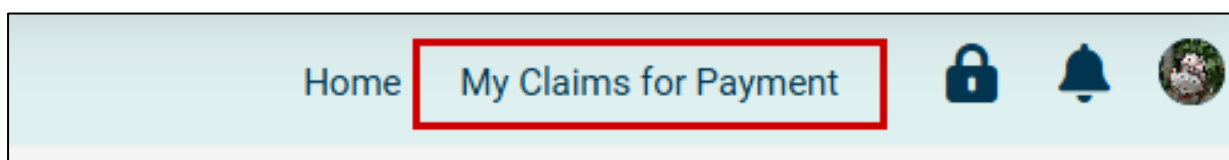


## MAKING A CLAIM FOR PAYMENT

### IMPORTANT:

The old Excel invoice template is no longer being accepted by the EPA. Please submit all claims for payment online as explained in this section.

If you are eligible to claim for reimbursement of your time spent evaluating proposals, reviewing reports and/or attending Steering Committee meetings click on the My Claims for Payment link in the header bar:



## Submitting a New Claim

To create a new claim, click on the Create New Claim for Payment button:

### NEW PAYMENT CLAIMS

If you are eligible to claim for reimbursement of your time spent evaluating proposals, reviewing reports and/or attending Steering Committee meetings click on the Create New Claim for Payment button to generate and submit a new claim.

If you have any queries please contact EPA Research (research@epa.ie).

Create New Claim for Payment

PSWT Explained

Professional Services  
Withholding Tax (PSWT)

Tax Clearance Explained

Tax Clearance

Instructions will appear at the top of the new payment claim. Complete all the fields and upload copies of your receipts for travel and accommodation (if applicable) – uploads must be in PDF format.

You can create a copy of the invoice by clicking on the Download Copy of Invoice for Your Records button (1), then submit the claim using the button at the bottom of the screen (2):

### Declaration

**\* Statement**

I confirm that the details submitted on this invoice are accurate, and I have included copies of my receipts in respect of travel and accommodation claims.

☐ Yes

Print Copy of Invoice for Your Records

Save Draft

Submit

The EPA will review your claim, and you will be notified of the outcome.

## New Supplier Setup

If you have not previously provided services to the EPA it will be necessary to request your bank details so that we can arrange for payment. If this is the case, you will receive a notification from donotreply.epa@smartsimple.ie with a New Supplier Form attached. Please complete the form in full and return it to research@epa.ie.

EPA Research - New Supplier Form Attached

donotreply.epa@smartsimple.ie  
To

New\_Supplier\_Form.xlsx  
34 KB

Dear

**Invoice number:**

**Services Provided:**

**Total Amount Invoiced:**

**Project/Proposal(s):**



As your claim progresses through the system you will be notified at each of the following stages by email from [donotreply.epa@smartsimple.ie](mailto:donotreply.epa@smartsimple.ie):

1. When your claim has been submitted or a revised claim has been submitted
2. If a New Supplier form has been issued
3. If revisions/clarifications are required to your claim
4. When your claim has been accepted by the EPA
5. When your claim has been forwarded to our accounts office for payment

<b>End of document:</b>	User Guide for Evaluators, Reviewers & Steering Committee Members
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