

Environmental Protection Agency  
An Ghníomhaireacht um Chaomhnú Comhshaoil



# EPA's Grant Management System – User Guide for Grantees

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The EPA Research Programme is a Government of Ireland initiative funded by the Department of Environment, Climate and Communications

# EPA Research Programme 2021- 2030

## EPA's Grant Management System – User Guide for Grantees

### Introduction

This document is a guide for grantees using the EPA's Grant Management System (System). It describes the functionality and interfaces of the System to Lead Applicants (Grantees) undertaking research projects funded by the EPA. 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.**

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

- 1) EPA Research Programme 2021-2030 – Guidelines and Terms & Conditions
- 2) EPA's Online Grant Management System – User Guide for Applicants

The above documents are available to download from the System or the EPA website ([www.epa.ie](http://www.epa.ie)).

### 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.

### Enabling Pop-ups

Please ensure that your browser settings permit pop-ups from the web site address displayed by the System ([https://epa.smartsimple.ie/s\\_Login.jsp](https://epa.smartsimple.ie/s_Login.jsp)).

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

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# Overview

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

## Grantee Functions

As the Lead Applicant, you can:

### 1. Edit, and submit Pre-generated Periodic reports

There are 2 different types of Periodic reports required during the lifetime of an EPA funded research project which are pre-generated by the System. These are:

- Financial Reports (Cost Statements and Post Completion Dissemination Cost Statements<sup>1</sup>)
- Project Progress Reports and Post Completion Dissemination Progress Reports.<sup>2</sup>

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

The System also facilitates the submission of requests for approval for the following activities:

- Budget Reallocation Requests
- Project Time Extension Requests
- Family Leave Requests
- Travel outside the EU and UK Requests

### 3. Create, edit, and submit final deliverables<sup>3</sup>

The System also facilitates the Submission of final deliverables that are required at the end of a project. Please refer to Part 2 Section D of the [EPA Research Programme 2021-2030 – Guidelines and Terms & Conditions](#) for further details.

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

**It is the responsibility of the Lead Applicant to:**

1. Ensure that all periodic 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 prior to the end of the project

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<sup>1</sup> Required for projects awarded pre-2021 only

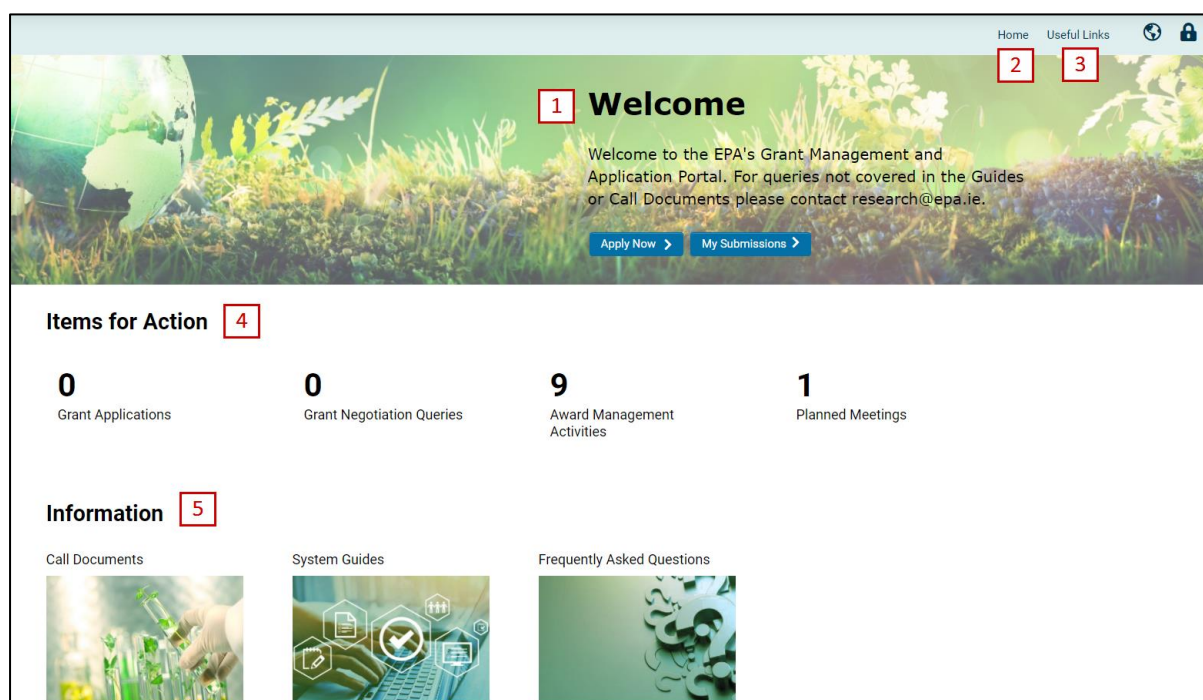
<sup>2</sup> Required for projects awarded pre-2021 only

<sup>3</sup> 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 System to load the Applicant Workbench. The Workbench is laid out in the following sections:

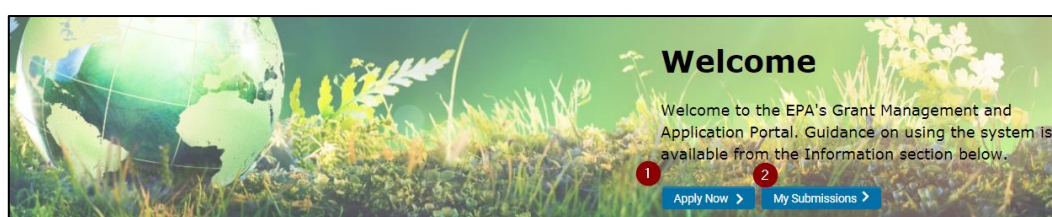
- 1) Welcome Banner which includes the Apply Now and My Submissions Buttons
- 2) Home – clicking on this from anywhere in the system will bring you back to the Home page
- 3) Useful links – clicking on this will take you to a new page that includes links to templates and documents that are available on the EPA website, including:
  - a. EPA Research Report guidance and templates
  - b. Evidence Synthesis Report guidance and templates
- 4) Items for Action
- 5) Information



## Welcome Banner

The welcome banner includes the following:

- 1) A link to Open EPA Research Calls via the Apply Now Button
- 2) A link to Grant Applications and Grant Management Activities via the My Submissions Button



## Items for Action

The Items for Action Section provides links to

- 1) Grant Applications that require your attention
- 2) Award Management Activities that require your attention
- 3) Grant Negotiation Queries
- 4) Planned Meetings

### Items for Action

1

1

Grant Applications

2

0

Award Management Activities

3

0

Grant Negotiation Queries

4

0

Planned Meetings

## Information Section

The Information Section provides links to

- 1) Call Documents and PDF guides
- 2) System Guides
- 3) EPA Research Call Frequently Asked Questions (FAQ's)

### Information

1

Call Documents



2

System Guides



3

Frequently Asked Questions



## Open Calls Section

Clicking on the Apply now button in the Welcome banner will bring you to the Open Calls page which lists all the current open calls. The section includes the following:

- 1) A list of available call topics under the headings of Climate Evidence, Healthy Environment, Green Circular Economy, Natural Environment, Innovation and Demonstration and Event Support
- 2) A link to the Call Technical Description Documents
- 3) The date and time of a call's Submission and Approval deadlines
- 4) An Apply button for each call topic

Open Calls									
<div> <a href="#">CLIMATE EVIDENCE (3)</a> <a href="#">HEALTHY ENVIRONMENT (3)</a> <a href="#">GREEN CIRCULAR ECONOMY (2)</a> <a href="#">NATURAL ENVIRONMENT (2)</a> <a href="#">INNOVATION AND DEMONSTRATION (1)</a> <a href="#">EVENT :</a> </div>									
<div> <input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/> <span>1-2 of 2</span> <input type="button" value="←"/> <input type="button" value="→"/> </div>									
#	Hub	Topic Number	Grant Type	Submission Deadline	Approval Deadline	Max Amount	Max Term (Months)	Call Technical Description Document	
1	Protecting and Restoring Our Natural Environment	Topic 1	Project Based Award	11/05/2021 16:00	12/05/2021 16:00	€350,000.00	36	<a href="#">Test_Tech_Description_Template.pdf</a>	<input type="button" value="Apply"/>
2	Protecting and Restoring Our Natural Environment	Topic 2	Project Based Award	11/05/2021 16:00	12/05/2021 16:00	€100,000.00	12	<a href="#">Test_Call_Documents.pdf</a>	<input type="button" value="Apply"/>

Please refer to the EPA's Grant Management System – User Guide for Applicants for further details

**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**.

## Grant Applications and Award Management Activities

Clicking the My Submissions button in the Welcome banner will bring you to a page displaying Grant Applications and Grant Management Activities.

Grant Applications

AWARDED GRANTS (2)

APPLICATIONS IN PROGRESS (7)

UNSUCCESSFUL APPLICATIONS (6)

1-2 of 2

#	Project Number	Lead Applicant	Lead Organisation	Grant Type	Project Type	Project Title	Status
Open	1 1012		EPA Research Test Organisation	Project Based Award	Large Scale Project		Grant Awarded
Open	2 2021-CE-1028		EPA Research Test Organisation	Project Based Award	Large Scale Project		Final Deliverables Under Review

Award Management Activities

PERIODIC REPORTS (2)

REQUESTS (2)

DELIVERABLES (3)

FINANCIALS (5)

POST-COMPLETION DISSEMINATION (0)

MEETINGS (1)

EVENT SUPPORT GRANTS (1)

1-2 of 2

#	Project Number	Project Status	Lead Applicant	Lead Organisation	Type	Activity Status	Report Number	Submit By
Open	1 2021-CE-1028	Final Deliverables Under Review		EPA Research Test Organisation	Cost Statement	Payment Made	1	28/07/2021
Open	2 2021-CE-1028	Final Deliverables Under Review		EPA Research Test Organisation	Project Progress Report	Draft	1	28/07/2021



## Grant Applications

Under the header Grant Applications you will find details under separate tabs of Awarded Grants, Applications in Progress and Unsuccessful Applications. You can also view and edit Draft Grant applications via the Grant Applications icon under the Items for Action heading on your home page.

Grant Applications		
AWARDED GRANTS (2)	APPLICATIONS IN PROGRESS (7)	UNSUCCESSFUL APPLICATIONS (6)

### Awarded Grants Tab

The Awarded Grants Tab provides access to all your EPA grant awarded projects. Clicking on the **Open** button at the start of the row will open the grant view page for that project.

### Applications in Progress Tab

The **Applications In Progress tab** displays a list of all the applications for funding that you have created via the System but have not yet been awarded, i.e. work-in-progress applications. You can click on any application in the list of Applications in Progress to view or edit an application at any point up until it has been submitted by clicking on the OPEN button. Please note you can only create a single draft application per call topic reference and you can only create an application when a call for proposals is open.

Grant Applications

AWARDED GRANTS (4)

APPLICATIONS IN PROGRESS (31)

UNSUCCESSFUL APPLICATIONS (3)

1-31 of 31

	#	Proposal Number	Lead Applicant	Lead Organisation	Grant Type	Project Type	Project Title	Status
Open	1	1073	Holly Dayin	EPA Research Test Organisation	Innovation and Demonstration Fund	Innovation and Demonstration Fund		Draft
Open	2	1072	Holly Dayin	EPA Research Test Organisation	Event Support Grant	Event Support Grant		Draft
Open	3	1069	Holly Dayin	EPA Research Test Organisation	Project Based Award	Medium Scale Project	DEMO PROJECT - 04/05/2021	Draft
				EPA Research Test		International Collaborations -	Collaborative Test Collaborative Test Collaborative Test Collaborative Test Collaborative	

### Unsuccessful Applications Tab

The Unsuccessful Applications Tab provides access to all applications submitted by you which were not submitted prior to a call deadline or were not funded following the evaluation process.

## Award Management Activities

Under the header Award Management Activities you will find details (under separate tabs of Periodic Reports, Requests, Deliverables, Financials, Post Completion Dissemination, Meetings and Event Support) of all activities related to the ongoing management of awarded grants.

Award Management Activities

PERIODIC REPORTS (7)

REQUESTS (2)

DELIVERABLES (4)

FINANCIALS (1)

POST-COMPLETION DISSEMINATION (0)

MEETINGS (6)

EVENT SUPPORT GRANTS (0)

	#	Project Number	Project Status	Lead Applicant	Lead Organisation	Type	Activity Status
Open	1	2021-ID-1051	Grant Awarded	Holly Dayin	EPA Research Test Organisation	Cost Statement	Approved

## Project Progress Report (PPR) Activity

Project Progress Reports (PPRs) 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 PPR is due. The submission of a Project Progress Report (PPR) involves several steps:

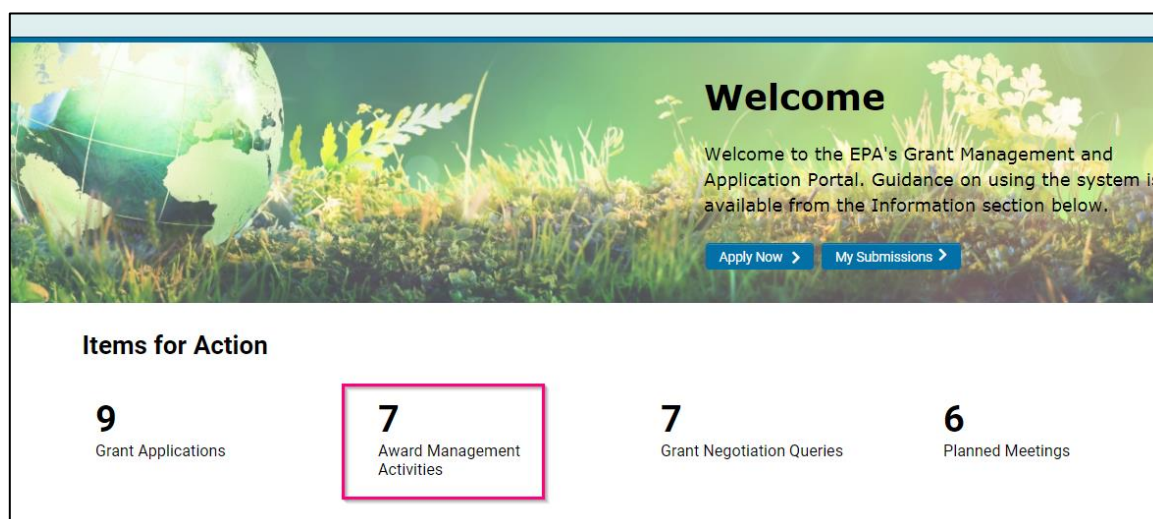
- a) Upload of PPR Template.
- b) Completion of text boxes on the PPR.
- c) Addition/update of Project Team Details.
- d) Addition/update of Events, Conferences and Workshops
- e) Addition/update of details in relation to Research Outputs under the headings of Summary of Peer Reviewed Outputs and Summary of Non Peer Reviewed Outputs
- f) Addition/update Summary of Engagement & Collaboration Activities with Key Stakeholders
- g) Addition/update Tools and Instruments (e.g. final versions of methodologies and datasets).
- h) Addition/update Summary of Innovations (e.g. Patents, NDA, trademarks and new products).
- i) Addition of information in relation to National and International funding leverage and linkages.

All PPRs must be submitted by completing the pre-generated Project Progress 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 Lead Applicant to ensure the PPR is completed using the correct templates and submitted before the reporting deadline.

### Open the Project Progress Report (PPR)

1. Once logged on to the System, click on the Award Management Activities icon on your Home page, select the relevant activity from the list that appears and click on the Open button to begin the process of submitting the PPR.



## Award Management Activities

#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<a href="#">Open</a>	1 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	2 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	3 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	4 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	5 Project Progress Report	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	6 End of Project Questionnaire (EPQ)	2021-NE-1060	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	7 Project Progress Report	2021-NE-1060	EPA Research Test Organisation	Holly Dayin	Draft

**IMPORTANT:** Pre-generated PPR Activities will appear in the Award Management Activities list view six months before they are due.

## Completing a Project Progress Report (PPR)

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

1. You should download both the Matrix of Deliverables versus Outcomes and the Project Management templates by clicking on the Download Matrix Template button and Download the Template Button as shown below

**\* Matrix of Deliverables Versus Outcomes**

Please complete and upload the completed Matrix of Deliverables Versus Outcomes using the template provided.

[Download Matrix Template](#)
[Upload Completed Matrix](#)

**Project Management**

**Detailed update on Project Management**

Please upload the Progress Report Document using the Progress Report Document Template (maximum 8 pages)

[Download the Template](#)
[Upload Completed Template](#)

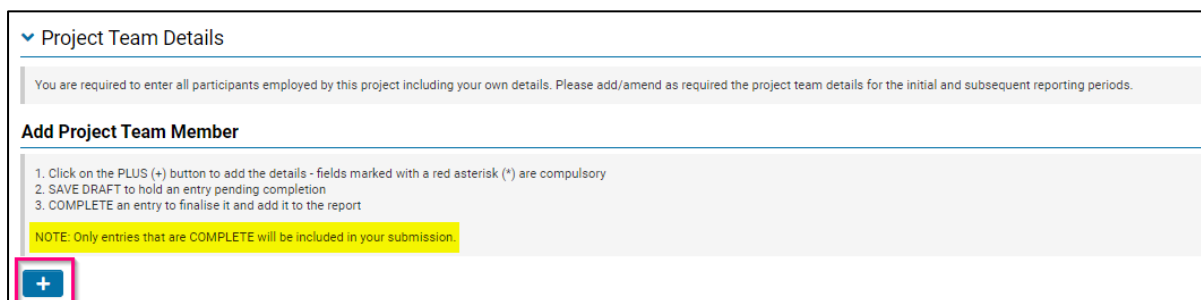
2. Once you have completed the templates please upload them as PDFs using the upload buttons as shown above. You can then complete the text fields related to:
  - a. Overall statement regarding progress vis-a-vis project aims and timeframe
  - b. Updated impact statement
  - c. Gender Dimension
  - d. Gender Equity
  - e. Citizen Science

## Project Team Details Section

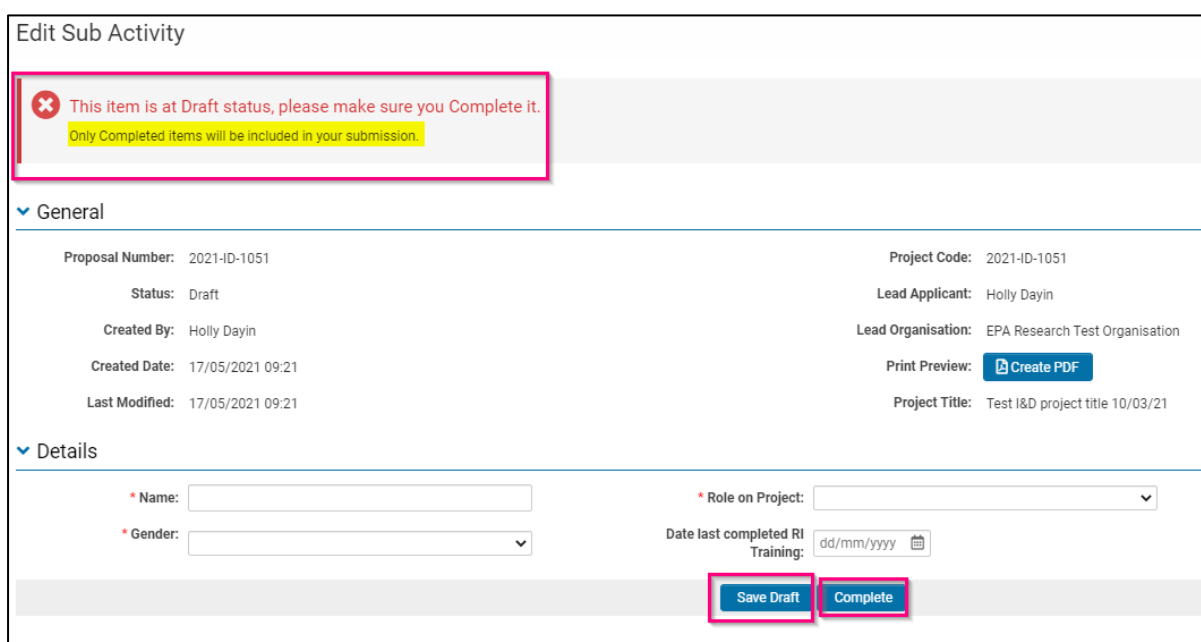
As part of the PPR submission, you are required to provide details of all research team members including yourself. To Add a Project Team member

1. Click on the PLUS (+) button to add the details. This will bring you to a new Sub Activity page - fields marked with a red asterisk (\*) on this page are compulsory

The instructions on how to add Project team members are provided on the form itself as shown below.



2. To add a research team member, click on the **Save Draft button** at bottom of the page and complete all fields. Once you have completed all fields press the Complete button. Please note that only entries that are complete will be included in your PPR submission.



3. Once you have clicked on the Complete button, click on the X at the top right-hand corner of the sub activity page – this will bring you back to the main Activity page

Edit Sub Activity

Click on the X to return to PPR Activity page

General

Proposal Number: 2021-ID-1051

Status: Complete

Created By: Holly Dayin

Created Date: 17/05/2021 09:24

Last Modified: 17/05/2021 09:24

Project Code: 2021-ID-1051

Lead Applicant: Holly Dayin

Lead Organisation: EPA Research Test Organisation

Print Preview: [Create PDF](#)

Project Title: Test I&D project title 10/03/21

Details

\* Name: Test

\* Gender: Female

\* Role on Project: PhD Student

Date last completed RI Training: 17/05/2021

Edit

4. Repeat this process for all Project team members.

Details of all project team members (whose status is Complete) will appear on the PPR in the **Submitted Project Team Details (Completed)** Table as shown below, once you click the **Save Draft** button on the PPR.

Add Project Team Member

1. Click on the PLUS (+) button to add the details - fields marked with a red asterisk (\*) are compulsory

2. SAVE DRAFT to hold an entry pending completion

3. COMPLETE an entry to finalise it and add it to the report

NOTE: Only entries that are COMPLETE will be included in your submission.

+

#	Status	Name	Role on Project	Gender	Date last completed RI Training
1	Draft				
2	Complete	Test	PhD Student	Female	17/05/2021

Submitted Project Team Details (Completed)

Name	Role on Project	Gender	Date last completed RI Training
Test	PhD Student	Female	17/05/2021

5. You can edit any Draft sub activities by clicking on the open button as highlighted below.

Add Project Team Member

1. Click on the PLUS (+) button to add the details - fields marked with a red asterisk (\*) are compulsory

2. SAVE DRAFT to hold an entry pending completion

3. COMPLETE an entry to finalise it and add it to the report

NOTE: Only entries that are COMPLETE will be included in your submission.

+

#	Status	Name	Role on Project
1	Draft		
2	Complete	Test	PhD Student

7. Details added in this section will automatically populate the same section in subsequent PPRs as well as the End of Project Questionnaire and 3-Year Post Completion survey.



**✖ This item is at Draft status, please make sure you Complete it.**  
Only Completed Items will be included in your submission.

**General**

Proposal Number: [ ] Project Code: [ ]  
 Status: Draft Lead Applicant: [ ]  
 Created By: [ ] Lead Organisation: [ ]  
 Created Date: 18/05/2021 00:13 Print Preview: [Create PDF](#)  
 Last Modified: 30/09/2021 12:57 Project Title: [ ]

**Details**

\* Type: conference poster \* Date Published: dd/mm/yyyy  
 \* Title: [ ] URL (If Relevant): [ ]  
 Attach [1](#) [2](#) [3](#) [4](#)  
☒ File Name ☐ Size Date  
☒ 516.8 KB 19/05/2021 17:42  
[5](#) [6](#) Total Files: 1  
[Save Draft](#) [Complete](#)

- When you return to the Project Progress Report, click on the Save Draft button to update the table with the new details.

	Type	Date Published	Title	URL (If Relevant)	Attach Copy
<a href="#">Open</a>	Conference Poster		[ ]		<a href="#">Attach Copy</a>
<a href="#">Open</a>	conference poster	30/09/2021	[ ]	<a href="https://www.epa.ie/">https://www.epa.ie/</a>	<a href="#">Attach Copy</a>
<a href="#">Open</a>	Conference Poster		[ ]		<a href="#">Attach Copy</a>

## Events/Conferences and Workshops Section

Please follow the steps outlined in the Project Team Details Section above to add details of Events, Conferences and Workshops related to your project. Details added in this section will automatically populate the same section in subsequent PPRs as well as the End of Project Questionnaire and 3-year post completion survey.

## Research Outputs Section

Please follow the steps outlined in the Project Team Details Section above to add details of Peer Reviewed outputs and Non-Peer Reviewed outputs for your project. In addition in this section you must confirm that all publications are compliant with the EPA Research Programme's policy on Open Access and Data by ticking the check box. Details added in this section will automatically populate the same section in subsequent PPRs as well as the End of Project Questionnaire and 3-year post completion survey.

## Engagement and Collaboration Activities with Key Stakeholders Section

Please follow the steps outlined in the Project Team Details Section above to add details of Engagement and Collaboration Activities with Key Stakeholders for your project. Details added in this section will automatically populate the same section in subsequent PPRs as well as the End of Project Questionnaire and 3-year post completion survey.

## Tools and Instruments Section

Please follow the steps outlined in the Project Team Details Section above to add details of Tools and Instruments for your project. Details added in this section will automatically populate the same section in subsequent PPRs as well as the End of Project Questionnaire and 3-year post completion survey.


## Innovations

Please follow the steps outlined in the Project Team Details Section above to add details of Innovations for your project. Details added in this section will automatically populate the same section in subsequent PPRs as well as the End of Project Questionnaire and 3-year post completion survey.

## Funding Leverages and Linkages

Please select the Yes or No option from the dropdown list related to the question “Since receiving EPA funding, has the project leveraged funding and/or established linkages with other partners in Ireland (e.g. SMEs, MNCs, Local Authorities, Academic Institutions, Government Bodies), or internationally?”

If the option Yes is chosen, please provide details in the text box that appears.



## Saving/Submitting the PPR

You can save the information you have entered on the PPR activity at any point by clicking on the **Save Draft button** and can return to the PPR later to continue adding details. To return to a Draft PPR that you have saved click on the Award Management Activities icon on your Home page.

1. Once you are satisfied that all relevant information has been included and the completed templates have been uploaded, the PPR 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 and will trigger an email to:
  - a) You, confirming that the PPR activity has been submitted successfully.
  - b) The EPA Research Officer administering your project stating that the PPR is available for review.
3. Following its submission, the EPA Research Officer will review the PPR. If the PPR receives a satisfactory review, it will be signed off and the status will change to Approved.



## Revising the PPR Following Review

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

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

1. Log into the System and click on the Award Management Activities icon on your Home page. Locate the Progress Report Activity that requires revision and click on the OPEN button.

Award Management Activities					
<div> <input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/> <span>1-4 of 4</span> <input type="button" value="←"/> <input type="button" value="→"/> </div>					
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<input type="button" value="Open"/>	1 End of Project Financial Summary	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Submitted to Applicant
<input type="button" value="Open"/>	2 End of Project Questionnaire (EPQ)	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<input type="button" value="Open"/>	3 Family Leave Request	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<input type="button" value="Open"/>	4 Project Progress Report	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Revision Required

2. Scroll to the bottom of the form to see the reasons why the PPR has been sent back to you for Revision.

Report Review

\* Is this report ready for approval?

No

If revision is required or the report is unsatisfactory (and the issues cannot be resolved) please provide details - this information will be made available to the Lead and Co-applicants

Test

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 PPR activity from Revision Required to Submitted and notification emails will be sent.
4. The EPA Research Officer will review the PPR again. If the PPR 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 PPR.
5. If the PPR requires further revision, please follow the steps outlined above.

## End of Project Questionnaire (EPQ) Activity

### Edit/Revise and Complete an EPQ

On completion of a project the lead applicant must complete and submit an End of Project Questionnaire (EPQ). The information provided will be used to demonstrate impact, value for money for environmental research and inform the future direction of the EPA Research Programme.

The EPQ Activity will be created automatically two months before the completion date of the project.

To edit/revise and submit an EPQ Activity please follow the same steps detailed in the PPR Activity.

Please note details already added, to the Project Progress Reports for the project, in relation to the following will automatically populate this report (i.e. applicant only needs to update them or add new items):

1. Summary of Project Team
2. Summary of Events Held
3. Summary of Peer-Reviewed Outputs
4. Summary of Non-peer reviewed Outputs
5. Summary of Key Stakeholders' Engagement & Collaboration Activities
6. Tools and Instruments
7. Summary of Innovations

## 3-Year Post Completion Survey Activity

### Edit/Revise and Complete a 3-Year Post Completion Survey

Three years after the completion of a project the lead applicant will be asked to complete and submit a post-completion survey. The information provided will be used to demonstrate impact, value for money for environmental research and inform the future direction of the EPA Research Programme.

You will receive a reminder email from [donotreply.epa@smartsimple.ie](mailto:donotreply.epa@smartsimple.ie) when the 3-Year Post Completion Survey is due to be submitted.

To edit/revise and submit an EPQ Activity please follow the same steps detailed in the PPR Activity.

Please note details already added, to the EPQ for the project, in relation to the following will automatically populate this report (i.e. applicant only needs to update them or add new items):

1. Summary of Project Team
2. Summary of Events Held
3. Summary of Peer-Reviewed Outputs
4. Summary of Non-peer reviewed Outputs
5. Summary of Key Stakeholders' Engagement & Collaboration Activities
6. Tools and Instruments
7. Summary of Innovations

## Cost Statement Activity

Cost Statements for Project Based Awards, Innovation and Demonstration (formerly 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 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 Cost Statement

1. Having logged on to the System, click on the Award Management Activities icon on your Home page, select the relevant activity from the list that appears and click on the Open button to begin the process of submitting the Cost Statement.

Award Management Activities					
				1-8 of 8	< >
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<a href="#">Open</a>	1 Cost Statement	1023	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	2 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft

**IMPORTANT:** Pre-generated Cost statement Activities will appear in the Award Management Activities list view six months before they are due.

### Completing the Cost Statement

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

1. You should download the Cost Statement Template by clicking on the Download Template button under the heading Cost Statement template as shown below:

**Cost Statement Template**

Where a project has more than one co-applicant, each co-applicant organisation will need to complete the cost statement template. It is the responsibility of the Lead Applicant to ensure all relevant data, signatures and requests outlined in the template are provided prior to upload. Each co-applicant's cost statement should be uploaded as a separate PDF document by the Lead Applicant. To facilitate the certification process, and Excel version of each applicant and co-applicant's cost statement must also be uploaded.

[Download Template](#) 1

**Please Note:** originals of all documentation uploaded here must be retained for a period of 7 years after the end of the project, or 3 years after the end of the EPA Research Programme, whichever is the later. Where other relevant legislation in regard to the retention of documentation of this nature requires that it be retained for a longer period then this should be observed.

[Upload Cost Statement\(s\)](#) 2

2. The Cost Statement template should then be completed for the Lead Organisation. Additionally, where a project has Co-Applicant organisations associated with it, each Co-Applicant will need to complete a separate Cost Statement template. Each organisation 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 Cost Statement(s) button as shown above. Instructions on how to complete the template are contained in the template itself.

3. It is the responsibility of the Lead Applicant to upload all Cost Statement templates and supporting documentation. Co-Applicants should therefore forward their completed Cost Statement template electronically to the Lead Applicant 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 Cost Statement activity, you should click on the Save Draft button at the bottom of the page

## Saving/Submitting the Cost Statement

1. Once you are satisfied that all relevant information has been included, the Cost Statement should be submitted by clicking on the **Submit** button at the bottom of the page.
2. Clicking the Submit will automatically change the status of the activity from Draft to Pending Financial Review 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 Cost Statement. If the Cost Statement receives a satisfactory review, it will be certified, and details forwarded to the EPA<sup>4</sup>. The status of the Cost Statement will change to either Certified – Payment Due or Certified No Payment Due.

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

## Responding to Queries on a 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.

**Please note** - 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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<sup>4</sup> 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 for Cost Statements with queries will have changed to Financial Queries Raised as shown below:

## Award Management Activities

1-8 of 8

#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status	
<div>Open</div>	1	Cost Statement	1023	EPA Research Test Organisation	Holly Dayin	Financial Queries Raised
<div>Open</div>	2	Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft



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


*i*
**Actions for Applicant**

**Actions for Applicant:**

1. Download the queries document and review all queries raised
2. Provide a response to the queries and upload it to the field below
3. Click on the Submit button to submit your response for review

**\* Financial Queries**

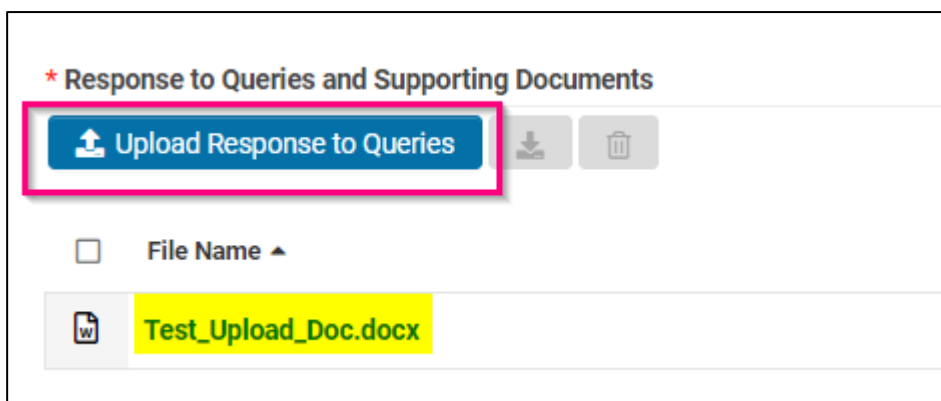
[Upload Queries](#)



<input type="checkbox"/>	File Name ▲
	Test_Upload_Doc.docx




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 Lead Applicant 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 Response to Queries as shown below:



**\* Response to Queries and Supporting Documents**

 Upload Response to Queries  

☐ File Name ▲

 Test\_Upload\_Doc.docx

5. To ensure that all uploads are attached to the Cost Statement page, click on the Save Draft button at the bottom of the page.

### Save/Submit your revised 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 Revisions button at the bottom of the page.

Clicking Submit Revisions will automatically change the status of the Cost Statement from Financial Queries Raised to Pending Financial Review 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 Cost Statement will change to either Certified – Payment Due or Certified – No Payment Due.

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

### Further Clarifications required on the 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 Cost Statement will have changed to Financial Queries Raised 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 Cost Statements

You will be notified by automated email once the EPA has approved your Cost Statement, and status of the activity will change to either Certified – Payment Due or Certified – No Payment Due.

## Budget Reallocation Request Activity

If required, the Grantee can request a reallocation of funds between eligible budget categories and Co-Applicant organisations. Normally, the total reallocation between budget categories should not exceed 15% of the total project budget. The Lead Applicant 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 system, click on the My Submissions button located in the Welcome banner on your Home page, Click on the Awarded Grants tab under the Grant Applications tab, locate the correct project in the list and click on the **Open** button at the beginning of the row:

Grant Applications

AWARDED GRANTS (5)


APPLICATIONS IN PROGRESS (28)

UNSUCCESSFUL APPLICATIONS (6)

1-5 of 5

	#	Project Number	Lead Applicant	Lead Organisation	Grant Type	Project Type	Project Title	Status
Open	1		Holly Dayin	EPA Research Test Organisation	Project Based Award	Medium Scale Project		Grant Awarded
Open	2		Holly Dayin	EPA Research Test Organisation	Project Based Award	Large Scale Project		Grant Awarded
Open	3	2021-ID-1051	Holly Dayin	EPA Research Test Organisation	Innovation and Demonstration Fund	Innovation and Demonstration Fund		Grant Awarded

This will bring to the project that you wish to create the Budget Reallocation Request for. Click on the Create Activities tab and then on the Create Budget Reallocation Request Button to create the Activity.


My Profile
English (US)
Privacy

←

2021-ID-1051

GENERAL
PROJECT SCOPE
PROJECT TEAM & WORK ALLOCATION
OUTPUTS & IMPACT DELIVERY
BUDGET DETAILS
DECLARATIONS & AUTHORISATION
CREATE ACTIVITIES

+ Create Project Time Extension Request

+ Create Family Leave Request

+ Create Deliverables - Reports and Papers

+ Create Budget Reallocation Request

+ Create Deliverables - Tools and Instruments

+ Create Travel Outside EU or UK Request

← BACK

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

1. When the new Budget Reallocation Request activity opens click on the Save Draft button at the bottom of the page:
2. All budget reallocation requests **must** be submitted using the standard template provided. Download the template by clicking on the Download template button.
3. Complete the template and ensure it has been signed by the relevant person(s) within the organisation(s) before uploading it in **PDF format**. To facilitate the review process an Excel version of each budget reallocation template must also be uploaded.
4. Complete the two text fields entitled:

- a. Please explain why the budget is no longer required in the category it is being transferred from.
- b. Please explain why additional budget is now required in the category it is being transferred to.

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

To facilitate the review process, an Excel version of each budget reallocation template must also be uploaded.

## 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. To return to a saved budget reallocation request activity click on the Award Management Activities icon on your Home page, locate the request in the list and click on the Open button.

Award Management Activities					
			<input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/>	1-9 of 9	<input type="button" value="←"/> <input type="button" value="→"/>
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<input type="button" value="Open"/>	1 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft
<input type="button" value="Open"/>	2 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft
<input type="button" value="Open"/>	3 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft

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 Pending Financial Review and will trigger an email to:
  - a) You, any Co-Applicants on the project as well as the Finance Office contact for your organisation 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 **Financial Queries Raised**.

Where justification for the request is insufficient, the request will be **Declined** and the status will change to **Not Approved**. In such circumstances, you may not re-submit the request using the same activity that has been Declined. You may, however, submit a new request with revised justification. To do so you will need to repeat the steps outlined in the Create and Complete 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. You will be informed of this via an email from the system which will contain the reason for revisions being required.

1. Log into the system and click on the Award Management Activities icon, locate the request in the list and click on the **Open** button.

Award Management Activities						
			<input type="text"/> <input type="button" value="Q"/>		1-9 of 9	
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status	
<input type="button" value="Open"/>	1 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft	
<input type="button" value="Open"/>	2 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft	
<input type="button" value="Open"/>	3 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Financial Queries Raised	

2. Make the necessary revisions and Submit:

Financial Review

Actions for Applicant

Actions for Applicant:

1. Download the queries document and review all queries raised  
2. Provide a response to the queries and upload it to the field below  
3. Click on the Submit button to submit your response for review

\* Financial Queries

File Name ▲

Test\_Upload\_Doc.docx

View Queries

\* Response to Queries and Supporting Documents

Upload Response to Queries

Upload response to Queries

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3. You should ensure that the appropriate person makes the necessary revisions to the budget re-allocation request template.
4. You should also ensure that the revised budget re-allocation request is signed scanned and uploaded by clicking on the Upload Response to Queries button as shown above.
5. Once the budget re-allocation form has been uploaded, click the **Submit** button at the bottom of the screen.
6. Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
  - a) You, any Co-Applicants associated with your project and the Finance Office contact for your organisation, 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 **Financial Queries Raised**. Instructions on how to re-submit the request are outlined above.

## End of Project Financial Summary

Following satisfactory completion of the project an End of Project Financial Summary Activity will be created by the EPA's Financial Consultants who will also upload a copy of the End of Project Financial Summary and details of any applicable funding to be decommitted.

When the Activity has been created an email will be triggered from the System to you, any Co-Applicants on the project, as well as, the Finance Office contact for your organisation requesting you to either confirm acceptance of the figures or to submit any queries that you have along with any supporting documentation.

### Open the End of Project Financial Summary

1. Having logged on to the System, click on the Award Management Activities icon on your Home page, and select the relevant activity from the list that appears and click on the Open button to view the End of Project Financial Summary.

Award Management Activities					
<input type="text"/> <input type="button" value="Q"/> 1-5 of 5 < >					
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<input type="button" value="Open"/>	1 End of Project Financial Summary	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Submitted to Applicant
<input type="button" value="Open"/>	2 End of Project Questionnaire (EPQ)	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<input type="button" value="Open"/>	3 Family Leave Request	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft

### Confirm Acceptance of the Figures contained in End of Project Financial Summary

1. You can download and view the End of Project Financial Summary and De-commitment letter by clicking on the document located under the heading Project Financial Summary as highlighted below.

▼

Project Financial Summary

The Financial Summary for this project and details of any applicable de-commitment amount are attached below. Please review these documents and, if in agreement, confirm acceptance. If you have any queries in relation to the financial aspects of this project, or should you wish to appeal against disallowed costs, you must submit them using this activity within 28 Days of this notification.

Download

☐ File Name ▲

De-commitment\_Letter\_and\_Financial\_Summary.pdf

\* Do you confirm acceptance of the figures?

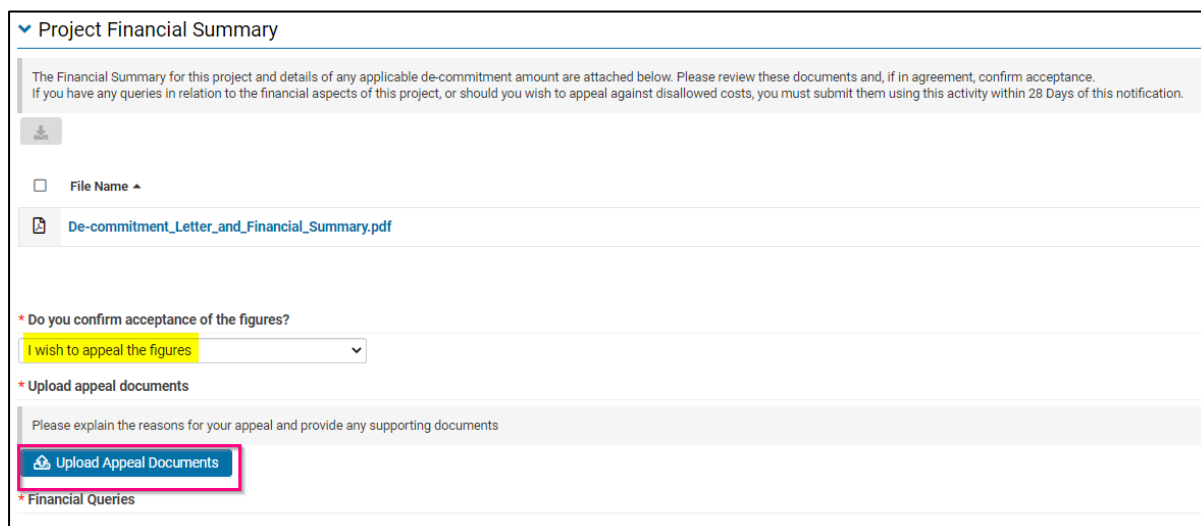
I confirm acceptance of the figures ▼

2. If you are in agreement with the figures in the End of Project Financial Summary and Decommitment letter choose the option "I confirm acceptance of the figures" from the "Do you confirm Acceptance of the figures dropdown" menu and click on the Accepted button at the bottom of the page.

- Following Acceptance of the figures the final Financial Summary, Certification and Decolmitment letters will be uploaded to the system by the EPA’s financial consultants and a payment request will be raised to release any retention payment that is due.

## Appeal the Figures contained in End of Project Financial Summary

- If you wish to appeal the figures in the End of Project Financial Summary and Decolmitment letter choose the option “I wish to appeal the figures” from the “Do you confirm Acceptance of the figures dropdown menu”



The screenshot shows a web form titled "Project Financial Summary". It includes a section for uploading a file named "De-commitment\_Letter\_and\_Financial\_Summary.pdf". Below this, there is a dropdown menu labeled "Do you confirm acceptance of the figures?" with the option "I wish to appeal the figures" selected. Underneath, there is a section for "Upload appeal documents" with a text box for explaining reasons and an "Upload Appeal Documents" button highlighted with a red box. At the bottom, there is a section for "Financial Queries".

- Please upload a document that explains the reasons for your appeal plus any supporting documents by using the Upload Appeal Documents button.
- When you are satisfied that all relevant information has been included, the End of Project Financial Summary Activity should be submitted by clicking on the **Query Decolmitment** button at the bottom of the page.
- Your appeal will now be reviewed, and you will be notified by email from [donotreply.epa@smartsimple.ie](mailto:donotreply.epa@smartsimple.ie) that the End of Project Financial Summary Activity is awaiting your response. The status of your request will have changed to **Submitted to applicant**.

## Responding to the review of an End of Project Financial Summary

- Where the EPA’s financial consultants are satisfied with the reasons for your appeal plus any supporting documents etc which resolve any outstanding financial queries they will upload a revised End of Project Financial Summary and Decolmitment letter to the section under the heading Project Financial Summary.

## Confirm Acceptance of the Figures contained in Revised End of Project Financial Summary

- If you are in agreement with the figures in the End of Project Financial Summary and Decolmitment letter choose the option “I confirm acceptance of the figures” from the “Do you confirm Acceptance of the figures dropdown menu” and click on the Accepted button at the bottom of the page.

- b. If you wish to appeal the revised figures in the End of Project Financial Summary and Decolmitment letter choose the option "I wish to appeal the figures" from the "Do you confirm Acceptance of the figures dropdown menu" - upload a document that explains the reasons for your appeal plus any supporting documents by using the Upload Appeal Documents button and click on the **Query Decolmitment** button at the bottom of the page.

### **Appeal the Figures contained in the Revised End of Project Financial Summary**

1. Where the EPA's financial consultants identify any queries following in relation to your appeal, they will upload these in the field entitled Financial Queries. To respond please follow the steps outlined to the Appeal the Figures contained in the End of Project Financial Summary section above.
2. Following Acceptance of the figures the final Financial Summary, Certification and Decolmitment letters will be uploaded to the system by the EPA's financial consultants and a payment request will be raised to release any retention payment that is due

## Project Time Extension Request Activity

In the event of a project encountering delays, it is the responsibility of the Lead Applicant to request a Project Time Extension. The Project Time Extension request should only be submitted within 6 months of the agreed completion date of the project but no later than 2 months before the agreed completion date. Unless agreed as an exception by the EPA (e.g. Family Leave), no more than one Project Time Extension request should be submitted, and it should not exceed 20% of the original project duration. Requests for time extension will be considered on a case-by-case basis.

### Create and Complete a Project Time Extension Request

Log into the system, click on the My Submissions button located in the Welcome banner on your Home page, click on the Awarded Grants tab under the Grant Applications tab, locate the correct project in the list and click on the **Open** button at the beginning of the row:

Grant Applications

AWARDED GRANTS (5)

APPLICATIONS IN PROGRESS (28)

UNSUCCESSFUL APPLICATIONS (6)

1-5 of 5

#	Project Number	Lead Applicant	Lead Organisation	Grant Type	Project Type	Project Title	Status
<div>Open</div>	1	Holly Dayin	EPA Research Test Organisation	Project Based Award	Medium Scale Project		Grant Awarded
<div>Open</div>	2	Holly Dayin	EPA Research Test Organisation	Project Based Award	Large Scale Project		Grant Awarded
<div>Open</div>	3	2021-ID-1051	Holly Dayin	EPA Research Test Organisation	Innovation and Demonstration Fund	Innovation and Demonstration Fund	Grant Awarded

This will bring to the project that you wish to create the Project Time Extension Request for. Click on the Create Activities tab and then on the Create Project Time Extension Request Button to create the Activity.

2021-ID-1051

GENERAL
PROJECT SCOPE
PROJECT TEAM & WORK ALLOCATION
OUTPUTS & IMPACT DELIVERY
BUDGET DETAILS
DECLARATIONS & AUTHORISATION
CREATE ACTIVITIES

+ Create Project Time Extension Request
+ Create Family Leave Request

+ Create Deliverables - Reports and Papers
+ Create Budget Reallocation Request

+ Create Deliverables - Tools and Instruments
+ Create Travel Outside EU or UK Request

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

1. Complete all the required fields in the Extension Requested Section:
  - a. Justification for time extension
  - b. Additional Months Requested
  - c. Classification



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 or requires revision.

## Revising the Project Time Extension Request Following Review

If your Project time Extension Request needs to be revised, you should

1. Log into the system and click on the Award Management Activities icon, locate the request in the list and click on the **Open** button.

Award Management Activities					
				1-7 of 7	< >
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<a href="#">Open</a>	1 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	2 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	3 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	4 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	5 Project Time Extension Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Revision Required
<a href="#">Open</a>	6 End of Project Questionnaire (EPQ)	2021-NE-1060	EPA Research Test Organisation	Holly Dayin	Draft
<a href="#">Open</a>	7 Project Progress Report	2021-NE-1060	EPA Research Test Organisation	Holly Dayin	Draft

2. When you are satisfied that all relevant information has been included, the revised Project Time Extension Request should be submitted by clicking on the **Submit** button at the bottom of the page.
3. Your Project Time Extension request will then be reviewed. You will receive an auto-generated email advising you of the outcome of this review.



# Travel Outside the EU and UK Request Activity

## Create and Complete a Travel Outside the EU Request

Log into the system, click on the Submission button located in the Welcome banner on your Home page, click on the Awarded Grants tab under the Grant Applications heading. Locate the correct project in the list and click on the **Open** button at the beginning of the row:

Grant Applications

AWARDED GRANTS (5)

APPLICATIONS IN PROGRESS (28)

UNSUCCESSFUL APPLICATIONS (6)

1-5 of 5

#	Project Number	Lead Applicant	Lead Organisation	Grant Type	Project Type	Project Title	Status
<a href="#">Open</a>	1	Holly Dayin	EPA Research Test Organisation	Project Based Award	Medium Scale Project		Grant Awarded
<a href="#">Open</a>	2	Holly Dayin	EPA Research Test Organisation	Project Based Award	Large Scale Project		Grant Awarded
<a href="#">Open</a>	3	2021-ID-1051	Holly Dayin	EPA Research Test Organisation	Innovation and Demonstration Fund	Innovation and Demonstration Fund	Grant Awarded

This will bring to the project that you wish to create the Travel outside EU or UK Request for. Click on the Create Activities tab and then on the Create Travel Outside EU or UK Request Button to create the Activity.

2021-ID-1051

GENERAL
PROJECT SCOPE
PROJECT TEAM & WORK ALLOCATION
OUTPUTS & IMPACT DELIVERY
BUDGET DETAILS
DECLARATIONS & AUTHORISATION
CREATE ACTIVITIES

+ Create Project Time Extension Request

+ Create Deliverables - Reports and Papers

+ Create Deliverables - Tools and Instruments

+ Create Family Leave Request

+ Create Budget Reallocation Request

+ Create Travel Outside EU or UK Request

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

- Complete all the required fields:
  - Name of Researcher travelling – Requests will be limited to one person per research project team who must be actively participating in an international event (i.e. must be presenting a paper/poster).
  - Departure Date
  - Return Date
  - Destination
  - Title of Event
  - Demonstrate how this request fits in with your plan for communication, dissemination and engagement.
  - Provide reasons why a similar event cannot be attended within the EU or UK
  - How will participation at this event be of benefit to the Irish research community?
  - Upload related documents (e.g. abstract of paper to be presented etc.).

## Saving/Submitting the Travel Outside the EU Request

- You can save information you have entered on the Travel Outside the EU or UK Request by clicking the **Save Draft** button, and then return to it later to add additional information. To return to a saved the Travel Outside the EU or UK Request activity click on the Award Management Activities icon on your Home page, locate the request in the list and click on the Open button.

Award Management Activities					
			<input type="text"/> <input type="button" value="Q"/>		1-9 of 9
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<input type="button" value="Open"/>	1 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft
<input type="button" value="Open"/>	2 Project Progress Report	1035	EPA Research Test Organisation	Holly Dayin	Draft
<input type="button" value="Open"/>	3 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<input type="button" value="Open"/>	4 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<input type="button" value="Open"/>	5 Budget Re-allocation Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<input type="button" value="Open"/>	6 Project Progress Report	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft
<input type="button" value="Open"/>	7 Travel Outside EU or UK Request	2021-ID-1051	EPA Research Test Organisation	Holly Dayin	Draft

- When you are satisfied that all relevant information has been included, the Travel Outside the EU or UK Request should be submitted by clicking on the **Submit** button at the bottom of the page.
- Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
  - You, confirming that the request has been submitted successfully.
  - 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, or revision is required.

## Revising the Travel Outside the EU Request Following Review

If your Travel Outside the EU or UK Request needs to be revised, you should

- Log into the system and click on the Award Management Activities icon, locate the request in the list and click on the **Open** button.

Award Management Activities					
			<input type="text"/> <input type="button" value="Q"/>		1-5 of 5
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<input type="button" value="Open"/>	1 End of Project Financial Summary	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Submitted to Applicant
<input type="button" value="Open"/>	2 End of Project Questionnaire (EPQ)	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<input type="button" value="Open"/>	3 Family Leave Request	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<input type="button" value="Open"/>	4 Project Progress Report	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<input type="button" value="Open"/>	5 Travel Outside EU or UK Request	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Revision Required

2. The reason for revision will appear at the top of the screen.


Test Reasons for Revision

GENERAL

<b>Proposal Number:</b> 2021-CE-1028 <b>Project Code:</b> 2021-CE-1028 <b>Lead Applicant:</b> Jack Russell <b>Lead Organisation:</b> EPA Research Test Organisation <b>Print Preview:</b> <a href="#">Print Preview</a>	<b>Type:</b> Travel Outside EU or UK Request <b>Activity Status:</b> Revision Required <b>Created By:</b> Jack Russell <b>Created Date:</b> 26/05/2021 09:38 <b>Last Updated:</b> 26/05/2021 09:43
---	--

3. When you are satisfied that all relevant information has been included, the revised Travel Outside the EU or UK Request should be submitted by clicking on the **Submit** button at the bottom of the page.
4. Your Travel Outside the EU or UK Request will then be reviewed. You will receive an auto-generated email advising you of the outcome of this review.

## 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 system. You will be notified via email from [donotreply.epa@smartsimple.ie](mailto:donotreply.epa@smartsimple.ie) when this has been done.

This activity has two main statuses:

- 1 Meeting – Planned
- 2 Meeting – Held

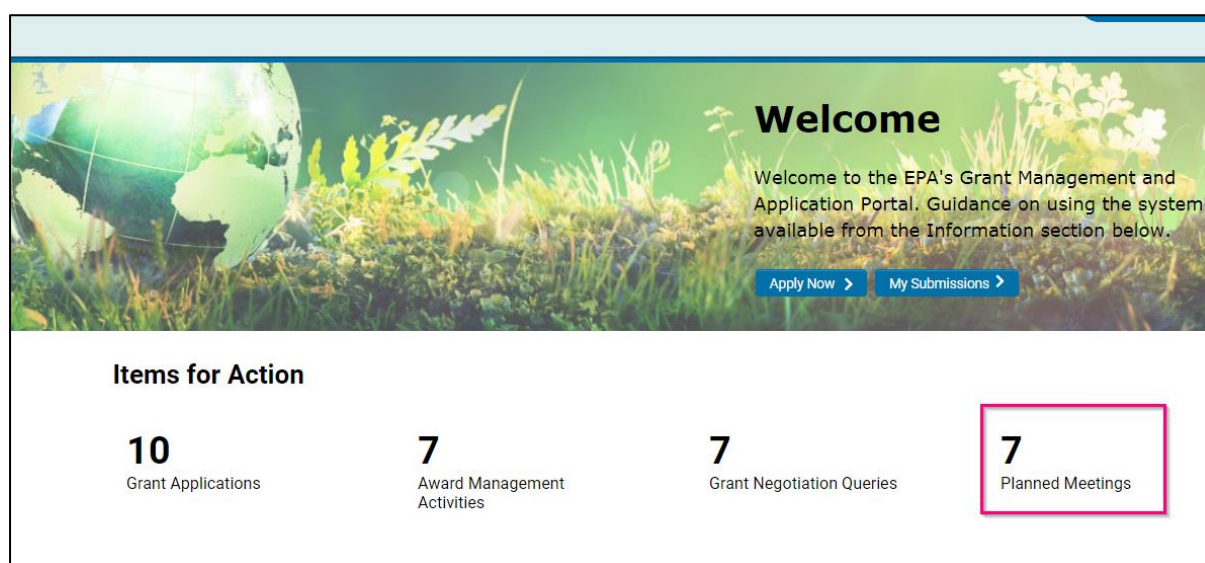
It allows for:

- The upload of the 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 System who have been invited to the meeting by the EPA Research Officer (e.g. Lead Applicant, Co-Applicants, Steering Committee members etc.) 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 System and click on the Planned Meetings icon on your Home page



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

Planned Meetings

1-7 of 7

< >

	#	Project Number	Lead Applicant	Lead Organisation	Type	Title	Start Date and Time	Meeting Status
Open	1	1045	Holly Dayin	EPA Research Test Organisation	Steering Committee Meeting	SC Meeting Number 1	14/03/2021 09:00	Meeting Planned
Open	2	1052	Holly Dayin	EPA Research Test Organisation	Kick-off Meeting	Testing	14/03/2021 10:00	Meeting Planned
Open	3	1045	Holly Dayin	EPA Research Test Organisation	Steering Committee Meeting	SC Meeting Number 7	17/03/2021 09:00	Meeting Planned
Open	4	1048	Holly Dayin	EPA Research Test Organisation	Steering Committee Meeting	Meeting no.6	18/03/2021 09:00	Meeting Planned
Open	5	1045	Holly Dayin	EPA Research Test Organisation	Steering Committee Meeting	SC Meeting No. 6	18/03/2021 16:45	Meeting Planned
Open	6	2021-ID-1051	Holly Dayin	EPA Research Test Organisation	Progress Meeting	Test meeting 03 05 21	05/05/2021 10:00	Meeting Planned
Open	7	2021-ID-1051	Holly Dayin	EPA Research Test Organisation	Kick-off Meeting	Test Kick off Meeting	20/05/2021 10:00	Meeting Planned

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

- ▶ Meeting Type
- ▶ Meeting Title
- ▶ Meeting Start Date and Time
- ▶ Meeting End Date and Time
- ▶ Meeting Location
- ▶ Meeting Agenda
- ▶ Related Documents
- ▶ Meeting Minutes

Meeting Details

\* Meeting Type:

Kick-off Meeting

\* Meeting Title:

Test Kick off Meeting

\* Meeting Start Date and Time:

20/05/2021 10:00

\* Meeting End Date and Time:

20/05/2021 13:00

\* Meeting Location

Online

Meeting Details

Test Meeting Details

\* Agenda:

File Name

Meeting\_Agenda\_Template\_V1.docx

Related Documents:

Upload Documents

File Name

Test\_Upload\_Doc.pdf

4. You can download the documents by clicking on the filename in the relevant field of the form.



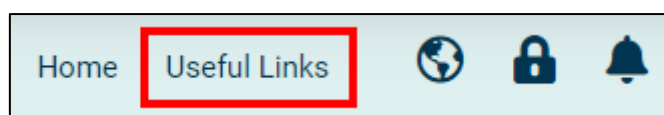
## Deliverables – Reports and Papers Activity

Please refer to the EPA Research Programme 2021-2030 – Guidelines and Terms & Conditions which lists the outputs and deliverables that may be required from your project (all deliverables marked as Compulsory must be submitted for all projects).

The following steps describe the submission and revision of an **EPA Research Report** but are applicable to all types of Deliverable that can be submitted using both the “Deliverables – Reports and Papers” and the “Deliverables – Tools and Instruments” Activities.

An EPA Research Report Layout Template and guidance on the submission of EPA Research Reports are available on the following page of the EPA website: [Submission of final reports.](#)

You can also access the templates and guidance by clicking on the Useful Links option in your header bar:



There are two types of deliverables activities and the correct one must be used to submit the item:

Activity Type	Used to Submit
Deliverables – Reports and Papers	<ol style="list-style-type: none"> <li>1. EPA Research Report</li> <li>2. Interim Report (e.g., feasibility/scoping study)</li> <li>3. Policy Brief</li> <li>4. Best Practice Guide</li> <li>5. Literature Review</li> <li>6. One Page Summary</li> <li>7. PhD Thesis</li> <li>8. Technical Report</li> <li>9. Infographic</li> <li>10. Innovation &amp; Demonstration Fund Report</li> </ol>
Deliverables – Tools and Instruments	<ol style="list-style-type: none"> <li>1. Model</li> <li>2. Dataset</li> <li>3. Database</li> <li>4. Methodology</li> <li>5. Imagery</li> <li>6. GIS</li> <li>7. Maps</li> </ol>

## Create and Complete a Deliverables – Reports and Papers Activity

Log into the system, click on the My Submissions button located in the Welcome banner on your Home page, click on the Awarded Grants tab under the Grant Applications tab, locate the correct project in the list and click on the **Open** button at the beginning of the row:

Grant Applications						
AWARDED GRANTS (2)		APPLICATIONS IN PROGRESS (7)		UNSUCCESSFUL APPLICATIONS (6)		
	#	Project Number	Lead Applicant	Lead Organisation	Grant Type	Project Type
Open	1	1012	Holly Dayin	EPA Research Test Organisation	Project Based Award	Large Scale Project
Open	2	2021-CE-1028	Jack Russell	EPA Research Test Organisation	Project Based Award	Large Scale Project

This will bring to the project that you want to create the Deliverables – Reports and Papers Activity for. Click on the Create Activities tab and then on the Create Deliverables – Reports and Papers Button to create the Activity.

2021-CE-1028

GENERAL
PROJECT SCOPE
PROJECT TEAM & WORK ALLOCATION
OUTPUTS & IMPACT DELIVERY
BUDGET DETAILS
DECLARATIONS & AUTHORISATION
CREATE ACTIVITIES

+ Create Project Time Extension Request
+ Create Family Leave Request
+ Create Deliverables - Reports and Papers
+ Create Budget Reallocation Request
+ Create Deliverables - Tools and Instruments
+ Create Travel Outside EU or UK Request

← BACK

When the **New Activity** opens click the Save Draft button at the bottom of the screen:

1. Select Deliverable Type that you want to submit from the “Deliverable Type” dropdown menu. In this example the option EPA Research Report has been chosen.

▼ Deliverable Details

\* Deliverable Type: EPA Research Report
\* Title: Test
\* Author(s): Test

\* Upload Document for Review

IMPORTANT

1. Upload ONE file for review only – do not upload multiple files, only the last document uploaded will be considered for review.  
2. If revision is required, the history of your previous upload(s) will be displayed below – you must ensure you upload the latest revised version before resubmitting the report for review.  
3. For revised versions of the document, please upload a tracked-changes version.

Upload EPA Research Report

Save Draft

Submit

2. Complete the Report Title and Report Authors fields
3. Upload the draft EPA Research Report in **Word Format only** to the Upload Report field.

User Guide for Grantees – Page 36



### IMPORTANT

Upload ONE file for review only – do not upload multiple files as only the last document uploaded will be available for review.

## Saving/Submitting the Deliverables – Reports and Papers Activity

1. You can save information you have entered on the Deliverables – Reports and Papers activity by clicking the **Save Draft** button, and then return to it later to add additional information. To return to a saved Deliverables – Reports and Papers activity click on the Award Management Activities icon on your Home page, locate the request in the list and click on the Open button.

Award Management Activities					
				1-5 of 5	< >
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<a href="#">Open</a>	1 Deliverables – Reports & Papers	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<a href="#">Open</a>	2 End of Project Financial Summary	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Submitted to Applicant

2. When you are satisfied that all relevant information has been included and the correct version of the EPA Research Report has been uploaded, the 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) 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 EPA Research Report Following Review

You will receive an auto-generated email from [donotreply.epa@smartsimple.ie](mailto:donotreply.epa@smartsimple.ie) when the review has been completed and revisions are required.

### IMPORTANT

You will need to submit a revised EPA Research Report within 14 days of receipt of this notification.

Award Management Activities					
<input type="text"/> <input type="button" value="Q"/> <span>1-5 of 5</span> <input type="button" value="←"/> <input type="button" value="→"/>					
	#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant
<input type="button" value="Open"/>	1	Deliverables – Reports & Papers	2021-CE-1028	EPA Research Test Organisation	Jack Russell
<input type="button" value="Open"/>	2	End of Project Financial Summary	2021-CE-1028	EPA Research Test Organisation	Jack Russell

- Review Details

Review Summary Current Round

Round	Reviewer	Recommendation	Reviewer Detailed Comments
2	Reviewer 1	Revisions Required	<a href="#">Brian_Review_2.docx</a>

EPA Notes to Researcher

Test EPA comments to Researcher

Save Draft

Submit

- Upload Document for Review

IMPORTANT

1. Upload ONE file for review only – do not upload multiple files, only the last document uploaded will be considered for review.

2. If revision is required, the history of your previous upload(s) will be displayed below – you must ensure you upload the latest revised version before resubmitting the report for review.

3. For revised versions of the document, please upload a tracked-changes version.

File Name

Final\_report\_2.docx

Final\_report\_1.docx

Previously uploaded EPA Research Report

Upload one copy of the revised EPA Research Report and one copy of Response Document

Upload Response Document

For any revised version of the Deliverable Report or Paper please 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.

Please note, the response document must be uploaded in a single document. Only the latest uploaded document will be considered.

File Name

Response\_Doc\_1.docx

Save Draft

Submit

### IMPORTANT

- a) A history of all versions of the EPA Research report that you have uploaded will be displayed in the upload Document for Review section. PLEASE ENSURE that the latest version (one document only should be uploaded) of the revised report has been uploaded before resubmitting.
  - b) A history of all versions of the Response Document that you have uploaded will be displayed in the Upload Response Document Section. PLEASE ENSURE that the latest version (one document only should be uploaded) of the Response Document has been uploaded before resubmitting.
- 
- 6. You can save information you have entered on the Deliverables – Reports and Papers Activity by clicking the **Save Draft** button, and then return to it later if necessary. To return to a saved Deliverables – Reports and Papers activity click on the Award Management Activities icon on your Home page, locate the request in the list and click on the Open button
  - 7. When you are satisfied that all relevant information has been included and the correct versions of both the EPA Research Report and Response Document have been uploaded, the 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 Draft to Submitted and will trigger an email to:
    - b) The EPA Research Officer administering your project stating that the report is available for review.
  - 9. Your Final Report will now 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 approved.
  - 11. If the report requires further revision you will need to log on to the System and repeat the steps outlined above.

## Event Report & Payment Activity

**NB:** This activity applies to Event Support Grants only.

To claim funding for an Event Support Grant you will be required to submit an Event Support & Payment activity within 3 months of the travel or event taking place.

### Create and Complete an Event Report & Payment Activity

Log into the system, click on the My Submissions button located in the Welcome banner on your Home page, click on the Awarded Grants tab under the Grant Applications Heading, locate the correct project in the list and click on the **Open** button at the beginning of the row:

Grant Applications

AWARDED GRANTS (3)

APPLICATIONS IN PROGRESS (6)

UNSUCCESSFUL APPLICATIONS (6)

</

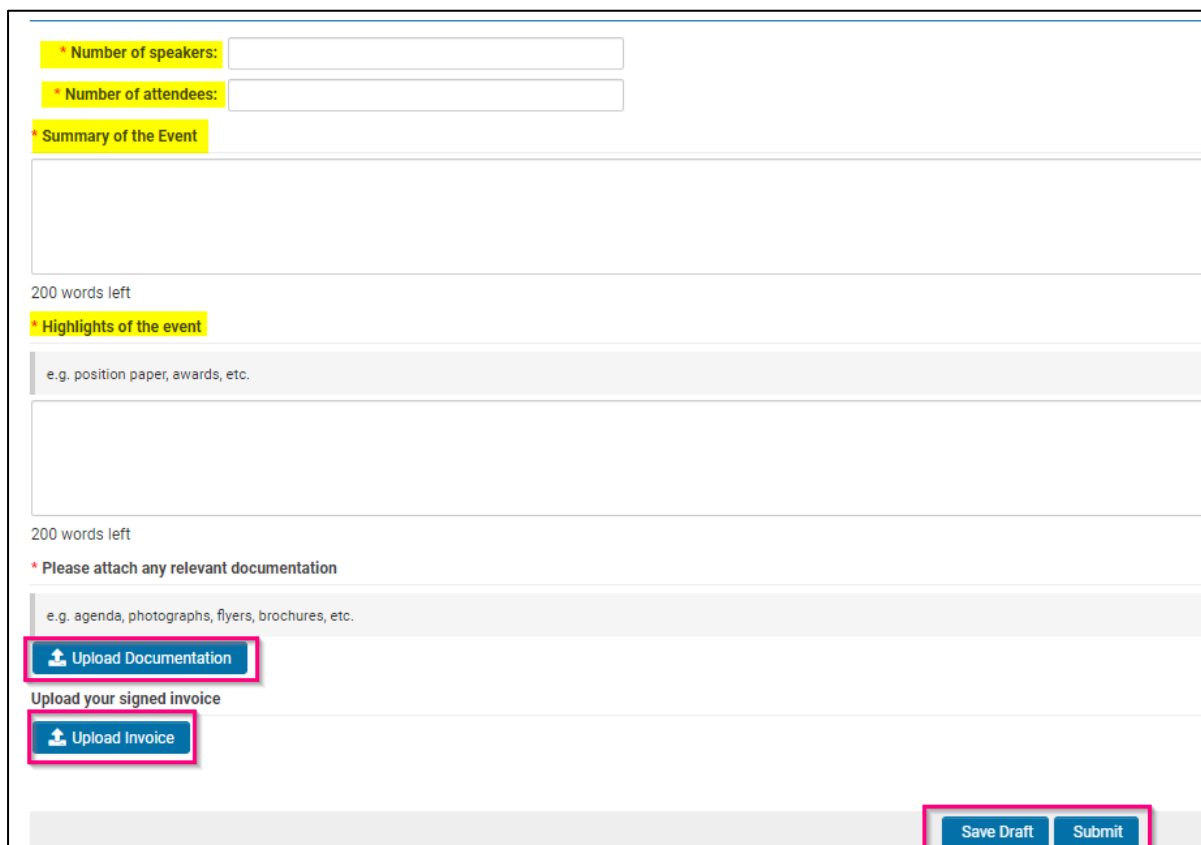
This will bring to the project that you want to create the Event Report & Payments Activity for. Click on the Create Activities tab and then on the +Event Report & Payment Button to create the Activity.

### 2021-ES-1041

GENERAL
PROJECT SCOPE
BUDGET DETAILS
DECLARATIONS & AUTHORISATION
CREATE ACTIVITIES

When the **New Activity** window opens click on the Save Draft button at the bottom of the page:

- Complete all the fields as listed in the Event Feedback Section:
  - Number of Speakers
  - Number of attendees
  - Summary of the event (200 words Max.)
  - Highlights of the Event (position paper, awards, etc.)
- Please upload any relevant documentation (e.g. agenda, photographs, Flyers, brochures etc.) by using the Upload Documentation button.
- Upload your signed invoice using the upload Invoice button



\* Number of speakers:

\* Number of attendees:

\* Summary of the Event

200 words left

\* Highlights of the event

e.g. position paper, awards, etc.

200 words left

\* Please attach any relevant documentation

e.g. agenda, photographs, flyers, brochures, etc.

Upload your signed invoice

## Saving/Submitting the Event Report & Payment Activity

1. You can save information you have entered on the Event Report & Payment Activity by clicking the **Save Draft** button, and then return to it later to add additional information. To return to a saved Event Report & Payment activity click on the Award Management Activities icon on your Home page, locate the Activity in the list and click on the Open button
2. When you are satisfied that all relevant information has been included, the Event Report & Payment 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 Event Report & Payment Activity has been submitted successfully.
  - b) The EPA Research Officer administering your project stating that the form is available for review.
4. If the Event Report & Payment Activity receives a satisfactory review, you will be notified by an auto-generated email. The status of the Event Report & Payment Activity will change to Approved and payment will be issued in due course.

## Revising the Event Report & Payment Activity

You will be notified by email from [donotreply.epa@smartsimple.ie](mailto:donotreply.epa@smartsimple.ie) that the Event Report & Payment Activity has been reviewed and that revisions required. The status of the Event Report & Payment Activity will change to **Revision Required**. You can access the Activity by clicking on the Award Management Activities icon on your Home page, locate the Activity in the list and click on the Open button.


Award Management Activities						
					1-5 of 5	
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status	
<a href="#">Open</a>	1 End of Project Financial Summary	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Submitted to Applicant	
<a href="#">Open</a>	2 End of Project Questionnaire (EPQ)	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft	
<a href="#">Open</a>	3 Family Leave Request	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft	
<a href="#">Open</a>	4 Project Progress Report	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft	
<a href="#">Open</a>	5 Event Report & Payment	2021-ES-1041	EPA Research Test Organisation	Jack Russell	Revision Required	

1. To view the reasons that revision is required scroll to the "If No, please provide details" filed at the bottom of the form.

Upload your signed invoice

[Upload Invoice](#)

☐ File Name



Is the event report and attached invoice satisfactory?

No

\* If No, please provide details (this feedback will be made available to the applicant)

test clarifications required

[Save Draft](#)
[Submit Revisions](#)

1. You can amend details that you have entered in all the fields as listed in the Event Feedback Section.
2. You can also upload additional or revised documentation by clicking on the Upload Documentation and /or the Upload Invoice buttons.
3. When you are satisfied that all relevant information has been included, the revised Event Report & Payment Activity should be submitted by clicking on the **Submit** Revisions button at the bottom of the page.
4. Once the revised Event Report & Payment Activity has been reviewed, you will receive an auto-generated email advising you that either further revision is required or that the report has been approved.
5. If the report requires further revision you will need to log on to the System and repeat the steps outlined above.

# Family Leave Request Activity

## Create and Complete a Family Leave Request

Log into the system, click on the My Submissions button located in the Welcome banner on your Home page, click on the Awarded Grants tab under the Grant Applications tab, locate the project in the list that you want to submit a Family Leave Request for and click on the **Open** button at the beginning of the row:

Grant Applications						
AWARDED GRANTS (2)		APPLICATIONS IN PROGRESS (7)		UNSUCCESSFUL APPLICATIONS (6)		
	#	Project Number	Lead Applicant	Lead Organisation	Grant Type	Project Type
Open	1	1012	Holly Dayin	EPA Research Test Organisation	Project Based Award	Large Scale Project
Open	2	2021-CE-1028	Jack Russell	EPA Research Test Organisation	Project Based Award	Large Scale Project

This will bring to the project that you want to create the Family Leave Request for. Click on the Create Activities tab and then on the Create Family Leave Request Button to create the Activity.

2021-CE-1028

GENERAL
PROJECT SCOPE
PROJECT TEAM & WORK ALLOCATION
OUTPUTS & IMPACT DELIVERY
BUDGET DETAILS
DECLARATIONS & AUTHORISATION
CREATE ACTIVITIES

+ Create Project Time Extension Request
+ Create Deliverables - Reports and Papers
+ Create Deliverables - Tools and Instruments

+ Create Family Leave Request
+ Create Budget Reallocation Request
+ Create Travel Outside EU or UK Request

The **New Activity** window will now open – Click on the Save Draft button at the bottom of the screen:

1. Select the **Type of Leave Requested** from the drop-down list

Details of Leave Request

\* Type of Leave Requested


Maternity Leave
Paternity Leave
Adoptive Leave
Parents Leave

dd/mm/yyyy

\* Name of Person Applying for Leave

\* Organisation of Person


- Complete all the other fields on the form and upload all relevant supporting documentation which must include a letter from the HR Department of the Host Institution of the person requesting leave confirming their status in respect of PRSI and entitlement or otherwise to Social Welfare Benefit and payment of salary whilst on maternity, paternity, parent's or adoptive leave. The letter should also confirm the employment status of the relevant staff member, their current salary and the stated end date of their employment contract. The letter should be signed by the following nominated personnel who's name, and position should also be identified in Block Capitals: Applicant for whom funding is sought, Lead Applicant, Authorised Financial Officer, Authorised HR Officer.


**Supporting documents**

The following documentation must be provided:

Each applicant must provide a letter from the HR Department of the Host Institution of the person requesting leave confirming their status in respect of PRSI and entitlement or otherwise to Social Welfare Benefit and payment of salary whilst on maternity, paternity, parent's or adoptive leave. The letter should also confirm the employment status of the relevant staff member, their current salary and the stated end date of their employment contract. The letter should be signed by the following nominated personnel who's name and position should also be identified in Block Capitals: Applicant for whom funding is sought, Lead Applicant, Authorised Financial Officer, Authorised HR Officer.

**\* Upload Supporting Documents**

 **Upload Documents**

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

### View Additional Instructions

Hover over the **question mark symbol (?)** at the end of each field that has one to view additional instructions and information regarding the details required for the field.

**\* Is the person who is applying for leave eligible to receive social welfare benefit?**

**\* Weekly Gross Salary (per contract)**

**Social welfare benefit (per week) -**



Gross salary refers to the salary before any deductions, taxes, PRSI and pension contribution. Gross salary is exclusive of Employers PRSI and Employer Pension.

## Saving/Submitting the Family Leave Request

- You can save information you have entered on the Family Leave Request by clicking the **Save Draft** button, and then return to it later to add additional information. To return to a saved the Family Leave Request activity click on the Award Management Activities icon on your Home page, locate the request in the list and click on the Open button.



Award Management Activities					
<input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/> 1-5 of 5 <input type="button" value="←"/> <input type="button" value="→"/>					
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<input type="button" value="Open"/>	1 End of Project Financial Summary	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Submitted to Applicant
<input type="button" value="Open"/>	2 End of Project Questionnaire (EPQ)	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<input type="button" value="Open"/>	3 Family Leave Request	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft

- When you are satisfied that all relevant information has been included and relevant documents uploaded, the Family Leave Request should be submitted by clicking on the **Submit** button at the bottom of the page.
- Clicking Submit will automatically change the status of the activity from Draft to Submitted and will trigger an email to:
  - You, any co-Applicants associated with the project and the Finance Office contact for your organisation confirming that the Family Leave request has been submitted successfully.
  - The EPA's financial consultants stating that the request is available for review.
  - The EPA Research Officer confirming that the Family Leave request has been submitted

The Family Leave Request will now be reviewed by the EPA's Financial consultants. Depending on the outcome of the review, the status will be updated as follows:

- Revision Required** - clarifications are required in relation to the financial aspects of the Request
- Financial Review Complete** - the financial review has been completed and the request forwarded to the EPA Research Officer managing the project for review.

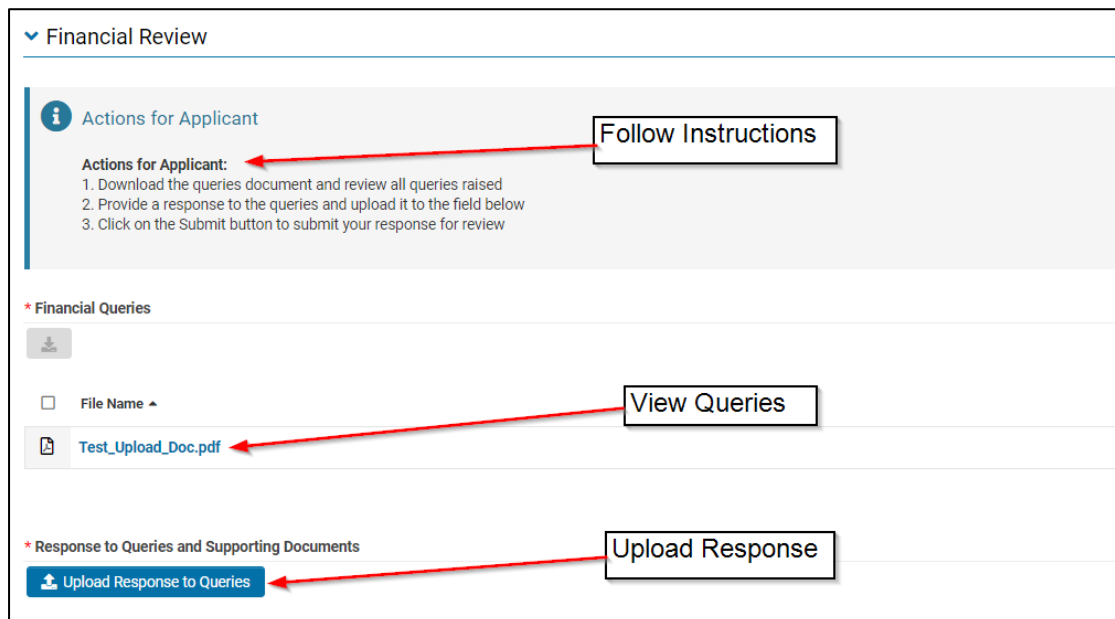
## Revising the Family Leave Request Following Review by the EPA's Financial Consultants

If clarifications are required, you will need to revise the Family Leave Request.

- Log into the System and click on the Award Management Activities icon on your Home page.
- Locate the request in the list and click on the **Open** button – the status of the Activity will be Financial Queries Raised.

Award Management Activities					
<input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/> 1-5 of 5 <input type="button" value="←"/> <input type="button" value="→"/>					
#	Type	Project/Proposal Number	Lead Organisation	Lead Applicant	Status
<input type="button" value="Open"/>	1 End of Project Financial Summary	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Submitted to Applicant
<input type="button" value="Open"/>	2 End of Project Questionnaire (EPQ)	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Draft
<input type="button" value="Open"/>	3 Family Leave Request	2021-CE-1028	EPA Research Test Organisation	Jack Russell	Financial Queries Raised

3. Follow the Instructions in the Actions for Applicant section of the Activity to view and respond to the Financial Queries:



**Financial Review**

**Actions for Applicant**

**Actions for Applicant:**

1. Download the queries document and review all queries raised
2. Provide a response to the queries and upload it to the field below
3. Click on the Submit button to submit your response for review

**\* Financial Queries**

File Name

Test\_Upload\_Doc.pdf

**\* Response to Queries and Supporting Documents**

Upload Response to Queries

4. You can edit previously completed fields and upload additional supporting documentation as well as a written response to the Financial Queries.
5. When you are satisfied that all clarifications have been addressed, the request should be submitted by clicking on the **Submit Revisions** button at the bottom of the page.
6. Clicking Submit Revisions will automatically change the status of the activity from Revision Required to Pending Financial Review and will trigger an email to:
  - a) You, any co-Applicants associated with the project and the Finance Office contact for your organisation confirming that the Family Leave request has been submitted successfully.
  - b) The EPA's financial consultants stating that the request is available for review.
  - c) The EPA Research Officer confirming that the Family Leave request has been submitted

The Request will now be reviewed by the EPA Research Officer and you will be notified of the outcome by automated email. If the Request is Approved the email will include any special instructions in relation to the requirement for a replacement person or a Project Time Extension Request. If the Request is Declined to email will contain the reason for this decision.

End of document