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Environmental Protection Agency
An Ghníomhaireacht um Chaomhnú Comhshaoil

EPA Research Programme 2014 – 2020

EPA's Grant Management and Application Portal – User Guide for Research Offices

Revised June 2019

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EPA Research Programme 2014 – 2020

EPA's Grant Management and Application Portal – User Guide for Research Offices

Introduction

This document is a guide for Research Offices and Managing Directors using the EPA's Grant Management and Application Portal. It describes the key steps required when reviewing and authorising proposals submitted from applicants within your organisation in response to an EPA Call for Research Proposals.

Please read this document carefully prior to using the portal.

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

1. EPA Research Technical Description Documents
2. EPA Research Terms and Conditions for Support of Grant Awards
3. EPA Research Guide for Applicants
4. EPA Research Guide for Grantees

The above documents are available to download from the [EPA's Online Grant Management and Application Portal](#) or from the [Call Documents page on the EPA Website](#).

The EPA Research Programme has implemented the following policies and strategies, which should be referred to when reviewing and authorising proposals:

- [EPA Research Gender Strategy](#)
- [EPA Research Policy on Maternity, Paternity and Adoptive Leave](#)

Guidance materials are available to users of the EPA's Grant Management and Application Portal and can be downloaded when logged in, or from the [Grants Management page on the EPA Website](#).

More Information

For further information or assistance please contact research@epa.ie.

Disclaimer

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

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Enabling Pop-ups

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

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

The EPA's Grant Management and Application Portal

The EPA's Grant Management and Application Portal is a web-based system which enables you to authorise a proposal submitted by an applicant within your organisation/company (except for the submissions for Researcher Travel Support Grants, Event Support and Small-Scale Studies). You will be able to access and review details of applications in order to:

1. Authorise an application before submission to the EPA
2. Request revision of an application before submission to the EPA
3. Review and decline an application

Applicant Functions

Applicants can:

- Create a researcher profile via the Registration Page
- Complete and submit grant application (when a call for proposals is open)

If a proposal is recommended for funding following evaluation, applicants will use the EPA's Grant Management and Application Portal to respond to any technical and/or financial queries raised during the evaluation process.

Grant Evaluators Interaction

The Evaluation process will be completed using the EPA's Grant Management and Application Portal. Grant Evaluators will be able to:

- View and review proposals submitted by applicants
- Complete and submit an Evaluation Form

Post-Award (Grantee) Functions

If a proposal is awarded funding, grantees will use the EPA's Grant Management and Application Portal to manage the grant award with the following activities:

- Project Management and Interim Reporting:
 - View and download/upload meeting documentation;
 - Submission of Technical Progress Reports;
 - Submission of Financial Cost Statements;
- Final Reporting:
 - Submission of Final/Synthesis Reports and Policy Briefs;
 - Submission of End of Project Questionnaire;
 - Submission of Metadata for the datasets/resources generated by your project;
 - Submission of Final Financial Cost Statement;
- Miscellaneous Requests:
 - Submission of no-cost time extension requests;
 - Submission of travel outside the EU requests;
 - Submission of budget reallocation forms.
 - Submission of maternity/paternity/adoptive leave requests

Reviewers/Steering Committee Members Interaction

Following the award of a grant, Steering Committee Members will be able to:

- View and download/upload meeting documentation
- View/download Technical Progress Reports and carry out their review
- View/download Final Reports and carry out their review

Definitions

Application Form/Grant View:

This is the form, which contains all the information in relation to an application/grant.

EPA Research Officer:

This refers to the EPA Research Team member administering the project.

Status: Submitted –Pending Institution Approval

This status corresponds to the applications that have been submitted by applicants before the submission deadline that require organisational authorisation to be validated.

Status: Submitted – Approved by Institution

This status corresponds to the applications that have been submitted by applicants before the submission deadline **and** that have been authorised before the approval deadline. Only applications at this status will be considered for evaluation.

Status: Submitted – Pending Revisions by Applicant

This status corresponds to the applications that have been submitted by applicants before the submission deadline, and for which you have requested changes to be made by the applicant.

Status: Submitted – Declined by Institution

This status corresponds to the applications that have been submitted by applicants before the submission deadline, and which you declined to authorise.

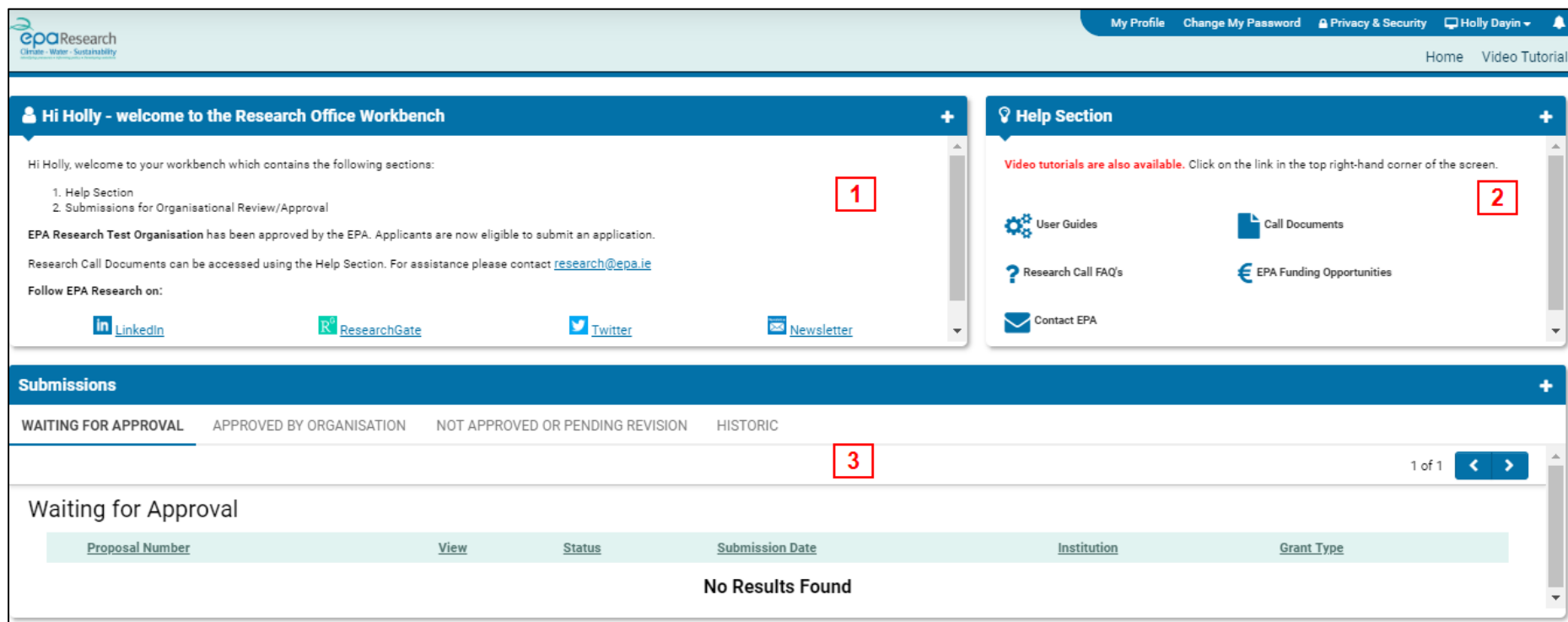
Grant Authoriser

This is the relevant person in your organisation (e.g. Research Offices for universities; Managing Director for companies, etc) who will review and authorise the submission of proposals to the EPA.

Research Office Workbench

When you first log into the EPA’s Grant Management and Application Portal you will be presented with the Research Office Workbench. The Workbench is laid out in the following sections:

1. Welcome note
2. Help section
3. Submissions



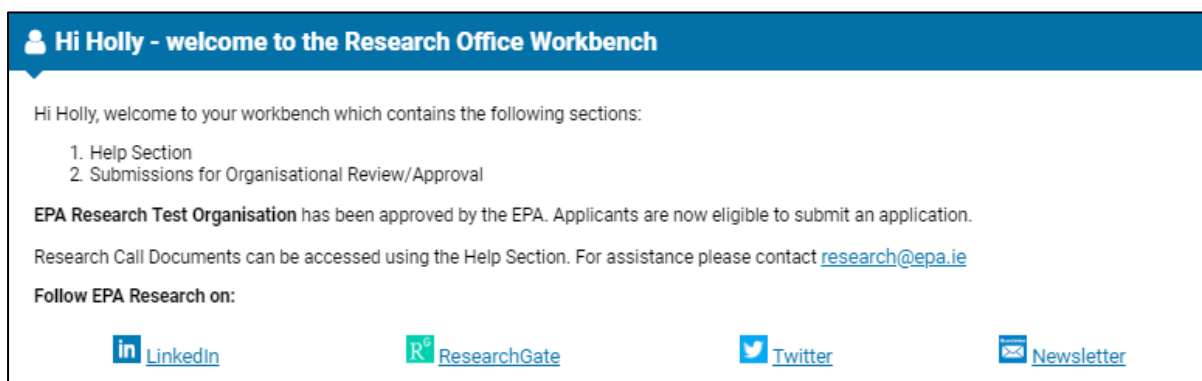
The screenshot shows the EPA Research Office Workbench interface. At the top, there is a navigation bar with the EPA Research logo and user options like 'My Profile', 'Change My Password', 'Privacy & Security', and 'Holly Dayin'. Below this, the main content area is divided into three sections:

- Section 1 (Welcome note):** A blue header reads 'Hi Holly - welcome to the Research Office Workbench'. Below it, a message says 'Hi Holly, welcome to your workbench which contains the following sections:'. A list follows: '1. Help Section' and '2. Submissions for Organisational Review/Approval'. Below this, it states 'EPA Research Test Organisation has been approved by the EPA. Applicants are now eligible to submit an application.' and 'Research Call Documents can be accessed using the Help Section. For assistance please contact research@epa.ie'. At the bottom, there are social media links for LinkedIn, ResearchGate, Twitter, and a Newsletter sign-up.
- Section 2 (Help Section):** A blue header reads 'Help Section'. Below it, a message says 'Video tutorials are also available. Click on the link in the top right-hand corner of the screen.' Below this, there are four links: 'User Guides', 'Call Documents', 'Research Call FAQ's', and 'EPA Funding Opportunities'. At the bottom, there is a 'Contact EPA' link.
- Section 3 (Submissions):** A blue header reads 'Submissions'. Below it, there are four tabs: 'WAITING FOR APPROVAL', 'APPROVED BY ORGANISATION', 'NOT APPROVED OR PENDING REVISION', and 'HISTORIC'. The 'WAITING FOR APPROVAL' tab is selected. Below the tabs, there is a pagination indicator '1 of 1' and navigation arrows. Below this, there is a table header with columns: 'Proposal Number', 'View', 'Status', 'Submission Date', 'Institution', and 'Grant Type'. Below the table header, the text 'No Results Found' is displayed.

Welcome Note

The welcome note includes the following:

1. The status of your organisation (e.g. approved, pending approval, declined)
2. A link to contact EPA Research Staff
3. Links to subscribe to EPA Research Communication channels



Hi Holly - welcome to the Research Office Workbench





Hi Holly, welcome to your workbench which contains the following sections:

1. Help Section
2. Submissions for Organisational Review/Approval

EPA Research Test Organisation has been approved by the EPA. Applicants are now eligible to submit an application.

Research Call Documents can be accessed using the Help Section. For assistance please contact research@epa.ie

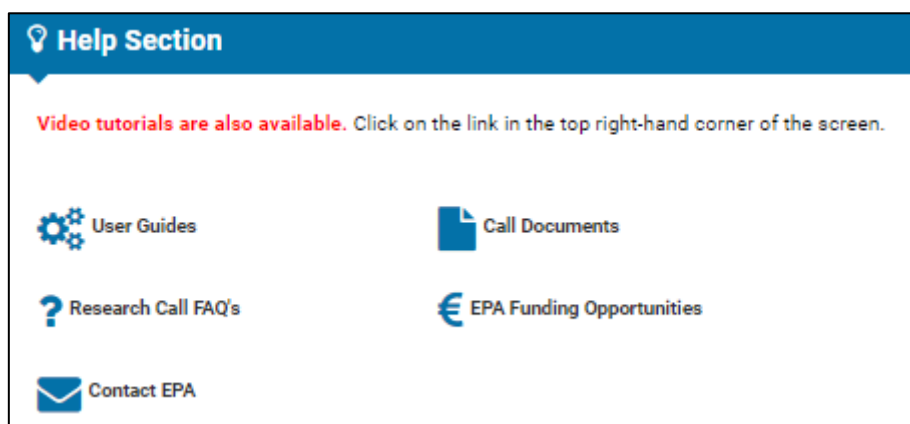
Follow EPA Research on:

 [LinkedIn](#)
 [ResearchGate](#)
 [Twitter](#)
 [Newsletter](#)

Help Section



The Help Section provides links to



1. User Guide
2. Call Documents
3. EPA Research Call Frequently Asked Questions (FAQ's)
4. EPA Funding Opportunities
5. A link to contact EPA Research Staff




Help Section

Video tutorials are also available. Click on the link in the top right-hand corner of the screen.

 [User Guides](#)
 [Call Documents](#)

 [Research Call FAQ's](#)
 [EPA Funding Opportunities](#)

 [Contact EPA](#)

Submissions Section

The tabs in the Submissions section allow you to view and access details of proposals which are:

1. Waiting for Approval
2. Approved by Organisation
3. Not Approved or Pending Revision
4. Historic (applications submitted under previous calls)

Submissions						
WAITING FOR APPROVAL	APPROVED BY ORGANISATION	NOT APPROVED OR PENDING REVISION	HISTORIC			
Waiting for Approval						
Proposal Number	View	Status	Submission Date	Institution	Grant Type	
No Results Found						

You will be notified by automated email from donotreply@epa.ie when a proposal has been submitted by an applicant from your organisation/company. The email will include the proposal number, project title, the name of the applicant, and details on how to access the EPA's Grant Management and Application Portal, as shown in the following image:

From: donotreply@epa.ie	To: donotreply@epa.ie
CC: holly.dayin@fake.ie, , research@epa.ie	Created: 21 June 2019 12:52
Subject: Request to authorise the proposal entitled Test Project Title For Demonstration Only (5708) submitted to the EPA	
<p>Dear Holly,</p> <p>The above-mentioned proposal has been submitted by Jack Russell, on and requires your authorisation before it can be considered for evaluation. Important: TO BE VALID, the proposal MUST be authorised BEFORE the Organisation Approval Deadline.</p> <p>To view this proposal please use the details below to log on to the EPA Grant Application and Project Management Portal: Login link: http://epa.smartsimple.ie Username: Your e-mail address Password: Existing password</p> <p>You can change your password when you login by clicking the Change Password icon. If you have forgotten your password you can click on the forgot password link on the login page.</p> <p>This is an auto-generated email. Please do not respond to this email address. If you have any queries in relation to its content, please contact research@epa.ie.</p> <p>Regards, EPA Research Programme 2014-2020</p>	

Reviewing Proposals – Important Information

PLEASE NOTE THE FOLLOWING IMPORTANT INFORMATION WHEN REVIEWING PROPOSALS:

1. Applications must be submitted under the correct Call Topic Reference (as indicated in the Technical Description Documents) – **mistakes will not be rectified.**
2. For all co-funded topics (indicated in the Technical Description Documents), applicants may not apply for or participate in projects that are to be co-funded by their organisation, even if their organisation would not be in receipt of funding.
3. Proposals that exceed the maximum duration and/or request funding in excess of the maximum specified for the Call Topic will be considered to be invalid and **will not proceed to evaluation stage under any circumstances.**
4. Proposals will be evaluated and selected based on the details submitted at the time of application. Changes to details following the submission of a proposal (including changes of Principal Investigators and Organisations) **will invalidate the application.**
5. **For an application to be valid**, the following must be completed:
 - All fields on the online application form
 - All sections of the project description template (applicants must use the template provided in the online application form – **variations will not be accepted by the EPA**)
 - All relevant sections of the budget template (applicants must use the template provided in the online application form – **variations will not be accepted by the EPA**).
6. All deadlines are strictly enforced, and **no exceptions will be entertained.**

The Review Process

To begin the review process:

1. Log into the portal and locate the **Submissions** section.
2. Click on the **Waiting for Approval** tab – a list of proposals awaiting approval by your organisation will be displayed.
3. Click on the **Open** button to view the proposal number you want to review.

Submissions						
WAITING FOR APPROVAL						
APPROVED BY ORGANISATION NOT APPROVED OR PENDING REVISION HISTORIC						
Waiting for Approval						
Proposal Number	View	Status	Submission Date	Institution	Grant Type	
1 5708	Open	Submitted - Pending Institution Approval		EPA Research Test Organisation	STRIVE - Project Based Awards	

4. The proposal details will now be displayed on screen. The **General** tab includes the proposal number, the status, and the name of the principal investigator (applicant).
5. Click on the **Project** tab to load full details of the proposal.

GENERAL		PROJECT	
Type:	STRIVE - Project Based Awards	Created Date:	06/21/2019
Project/Proposal Number:	[REDACTED]	EPA Research Officer:	[REDACTED]
Organisation:	EPA Research Test Organisation	Principal Investigator:	Jack Russell
Status:	Submitted - Pending Institution Approval	Modified Date:	06/21/2019 12:52

6. All fields in the proposal will be available for you to review, including:
 - The Call Topic Reference
 - The project title
 - The projected duration
 - The total grant aid requested
 - Text fields completed by the applicant
 - Details of any assigned project participants

Project Overview	
Call Topic Reference:	Water 2019 - Project 2 ?
Project Type:	Medium Scale Project
Project Title:	Test Project Title For Demonstration Only ?

GENERAL **PROJECT**

* Projected Duration (Months): 36

* Total Cost of Project Requested (€): €200,000.00 ?

* Total Grant Aid Requested (€): €200,000.00 ?

* Provide a short summary of the proposed research:

Text completed by the applicant will be visible here.

* Demonstrate how proposal will deliver value for money:

This information will be used to inform the deliberative process of the National Overview Committee.

Text completed by the applicant will be visible here.

Project Co-ordinator and Participants:

Full Name	Role	Organisation
Jack Russell	Project Coordinator	EPA Research Test Organisation
Andy Waywegoe	Project Participant	EPA Research Test Organisation
Grace Quirrell	Project Participant	EPA Research Test Organisation

7. You can also download and review files attached to the application (e.g. the project description document and the budget template) by clicking on the hyperlinks:

Project Description

Please upload the project description document using the template provided by clicking [HERE](#). Do not exceed 10MB (available on home page by clicking Open Call Documentation).

[Project_description_document_test.pdf](#)

Budget Details

Please upload the completed Excel budget spreadsheet using the template provided by clicking [HERE](#):

[Budget_Upload_Test.xls](#)

8. At the bottom of the online application form you can view the **Declaration**. Prior to submitting the proposal, the applicant must confirm agreement with the statements.

NB: the statements within the Declaration may be updated and revised periodically.

Part A: Declaration

I confirm that I have read the Terms and Conditions, Technical Description and Guide for Applicants available in this portal via the home button.

I declare that the information I have provided in this application is complete and accurate.

I agree that the Environmental Protection Agency may make any enquiries it considers necessary to verify the information therein and consent to the release by other people or organisations of such information as may be necessary for that purpose.

I note that applicants may be disqualified from consideration for funding if false or misleading information is provided and/or the application is not specific to one of the topics listed in the associated Technical Description document available on the EPA website.

For proposals submitted from 2018 onwards: I confirm that I have read and accepted the EPA Privacy Policy and Terms of Use of EPA Websites.

For proposals submitted from 2019 onwards: I confirm that if any aspect of this research proposal requires ethical approval that written evidence of such ethical approval will be submitted to the EPA before that aspect of the research commences.

IF YOUR ORGANISATION OR ANY OF YOUR PARTNER ORGANISATIONS IS/ARE A HIGHER EDUCATION INSTITUTION:

1) I confirm that my organisation and any partner organisations has/have attained the Athena Swan Bronze Institutional award or that it is / they are committed to attaining the award by 2019.

2) I confirm that my organisation and any partner organisations will adhere to the commitments of the National Policy Statement on Ensuring Research Integrity in Ireland and will abide by the Guidelines included in the European Code of Conduct for Research Integrity, as applicable.

Once you have reviewed the proposal you can use to the buttons at the bottom of the form to:

- **Approve the proposal** (Authorised button) – the proposal will then be validated and considered for evaluation
- **Request revisions** (Revision Required button) – the applicant will then be requested to amend their proposal. When the revisions have been completed the applicant will need to resubmit the proposal for approval and you will be requested to review the proposal again
- **Decline the proposal** (Not Authorised button) – if you decline the proposal it not be processed any further by the EPA.

Authorised - Click to approve the application.

Not Authorised - Click to decline the application.

Revision Required - If the application requires revision, click to notify the applicant to revise the application.

Authorising a Proposal

1. To start the process of proposal authorisation, click on the **Edit button** at the top left of the grant view
2. Scroll down to the section entitled: **Part B: Authorisation**
3. Complete the **Authorisation tick box** and click the **Save Draft button** at the bottom of the form

NB: The Name and Date fields will auto-complete when you click on the Authorised button.

Part B: Authorisation

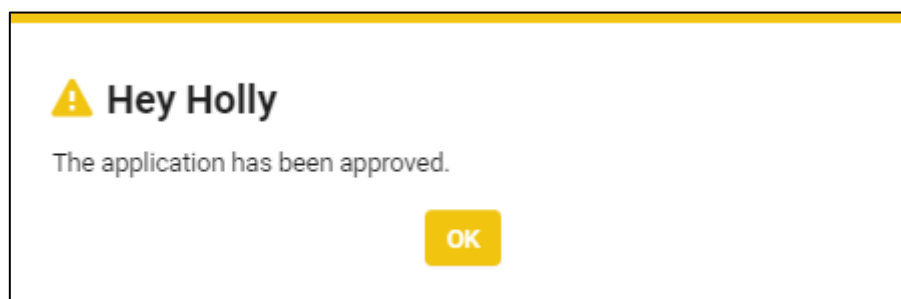
I confirm that I am the appropriate person to authorise / decline the submission of this proposal as indicated below:

*** Authorisation:** I agree

Name:

Date:

4. Click on the **Authorised button** – the following pop-up confirmation will appear on your screen:



5. The status of the proposal will now change to **Submitted – Approved By Institution** and an automated email notification will be issued to the applicant.

GENERAL

PROJECT

Type: STRIVE - Project Based Awards	Created Date: 06/21/2019
Project/Proposal Number: [REDACTED]	EPA Research Officer: [REDACTED]
Organisation: EPA Research Test Organisation	Principal Investigator: Jack Russell
Status: Submitted - Approved By Institution ■	Modified Date: 06/21/2019 13:46

IMPORTANT: Proposals that have not been authorised by the Organisation Approval Deadline will not be considered as valid.

- You can view the proposals that you have approved by clicking on the **Approved by Organisation** tab in the **Submissions** section on your **Home page**:

Submissions						
WAITING FOR APPROVAL		APPROVED BY ORGANISATION		NOT APPROVED OR PENDING REVISION		HISTORIC
						1 of
Approved by Organisation						
Proposal Number	View	Status	Submission Date	Institution	Grant Type	
1 5708	Open	Submitted - Approved By Institution		EPA Research Test Organisation	STRIVE - Project Based Awards	

Requesting Revision of a Proposal

1. To request revision of a proposal, click on the **Edit button** at the top left of the grant view
2. Scroll down to the section entitled: **Part B: Authorisation**
3. Complete the **Authorisation tick box** and click the **Save Draft button** at the bottom of the form

NB: The Name and Date fields will auto complete when you click on the Revisions Required button.

Part B: Authorisation

I confirm that I am the appropriate person to authorise / decline the submission of this proposal as indicated below:

*** Authorisation:** I agree

Name:


Date:

4. Complete the compulsory text box entitled **Provide Justification / Reason if not authorised or revision is required – this will be made visible to the applicant** and click on the **Save Draft button** at the bottom of the screen:

Provide Justification / Reason if not authorised or revision is required - this will be made visible to the applicant:

This proposal requires revision because

5. Click the **Revisions Required button** - the following pop-up confirmation will appear on your screen:



Hey Holly

The applicant will be notified by automatic email that this application needs to be amended.

OK

6. An automated email will be sent to the applicant notifying them the proposal needs to be revised. The text entered in the **Provide Justification / Reason if not authorised or revision is required** field of the will be copied into the notification email.

7. The status of the proposal will change to: **Submitted – Pending Revisions by Applicant**

GENERAL PROJECT

Type: STRIVE - Project Based Awards **Created Date:** 06/21/2019

Project/Proposal Number: [REDACTED] **EPA Research Officer:** [REDACTED]

Organisation: EPA Research Test Organisation **Principal Investigator:** Jack Russell

Status: Submitted - Pending Revision by Applicant **Modified Date:** 06/21/2019 14:07

8. You can view the proposals that you have sent for revisions by clicking on the **Not Approved or Pending Revision Tab** in the **Submissions** section on your **Home page**:

Submissions

WAITING FOR APPROVAL APPROVED BY ORGANISATION **NOT APPROVED OR PENDING REVISION** HISTORIC

1 of 1

Not Approved or Pending Revision

Proposal Number	View	Status	Submission Date	Institution	Grant Type
1 5708	Open	Submitted - Pending Revision by Applicant	2019-06-21	EPA Research Test Organisation	STRIVE - Project Based Awards

9. When the applicant has resubmitted their revised proposal, you will be notified by email from donotreply@epa.ie.

IMPORTANT: Proposals that have not been authorised before the Organisation Approval Deadline will not be considered as valid.

Declining/Rejecting a Proposal

1. To start the process of declining/rejecting a proposal, click on the **Edit button** at the top left of the grant view
2. Scroll down to the section entitled: **Part B: Authorisation**
3. Complete the **Authorisation tick box** and click the **Save Draft button** at the bottom of the form

NB: The Name and Date fields will auto-complete when you click on the Not Authorised button.

Part B: Authorisation

I confirm that I am the appropriate person to authorise / decline the submission of this proposal as indicated below:

*** Authorisation:** I agree

Name:

Date:

4. Complete the compulsory text box entitled **Provide Justification / Reason if not authorised or revision is required – this will be made visible to the applicant** and click on the **Save Draft button** at the bottom of the screen:

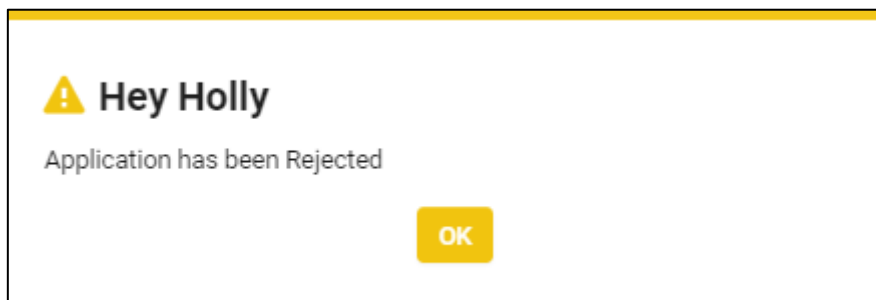
Provide Justification / Reason if not authorised or revision is required - this will be made visible to the applicant:

5. Click on the **Not Authorised button** – the following pop-up warning will appear on your screen:

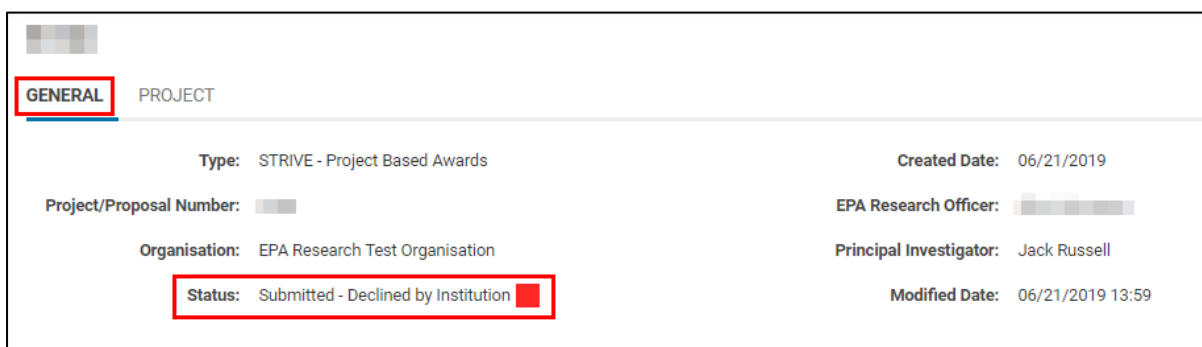
Are you sure you want to reject this application. The Applicant will not be able to amend his/her submission and this proposal will not be processed. Please confirm that you want to reject this submission

6. If you are sure that you want to decline this proposal, click on the **OK button**

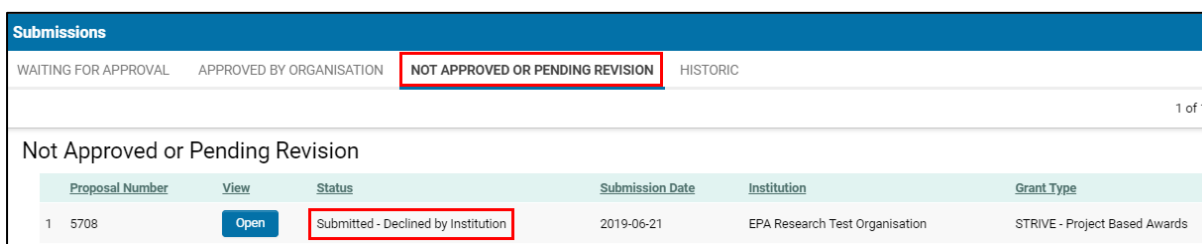
7. The following pop-up confirmation will appear on your screen:



- 8. An automated email will be sent to the applicant notifying them the proposal has not been authorised. The text entered in the **Provide Justification / Reason if not authorised or revision is required** field of the will be copied into the notification email.
- 9. The status of the proposal will change to: **Submitted – Declined by Institution:**



10. You can view proposals that you have declined by clicking on the **Not Approved or Pending Revision Tab** in the **Submissions section** on your **Home page**:



IMPORTANT: Proposals that have been declined by the institution/company will not be processed any further by the EPA.