



Guide to HMSTrust Online Application

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BEFORE YOU BEGIN

Please read all of the instructions before you start your online application.

If the information provided does not assist you or you encounter technical difficulties, please contact HMSTrust on 03 9999 3000 or email grants@hmstrust.org.au.

We recommend that you start work on your online application well before the deadline in case you experience technical difficulties with your IT system that may prevent you from lodging your application form on time if you leave it to the last day. Applications cannot be accepted after the deadline.

[Sample Application Forms](#) have been provided for reference before starting your online application. These are located under [Applying for a grant](#) on our website.

Web Browser Requirements

The recommended web browsers are Internet Explorer, Mozilla Firefox or Safari for Mac computers.

Google Chrome is NOT recommended! Applicants often experience issues when using Google Chrome as it is not supported by our grant management software.

Ensure that internet cookies are enabled on your browser. If you are unsure how to enable cookies, simply search 'enabling cookies' and follow the instructions relating to your browser.

IMPORTANT: Do not use the forward and back buttons of your browser to navigate through the application form as that may cause you to lose your application data. Use only the page tabs across the top of the application form or the *Next* link at the bottom of the application form as this saves your work as your progress through the form.

New Applications

You can only access a NEW online application form from the [Application Gateway](#) page of our website. Online applications will only be available when a grant round is open.

Please discuss your proposal with a Grants Team member before commencing an application for any of our grant levels.

Once you have received the go ahead from HMSTrust to submit an application, ensure you commence the online form with your organisation details and we recommend uploading the general documents requested such as your latest annual report and audited financial statements. You can return to complete the specific project information at a later time.

Previous Online Applicants

If your organisation has previously submitted an online application in any grants round since January 2014, you will need to use the same *My Account* email address and password as used previously.

This account is used to access, submit and track your application and any past or future submissions over multiple sessions, and is used to submit requirements and reports for grants approved. See *Working with My Account*.

Note: New applications will be pre-populated with your organisation details as supplied in previous grant applications.

New Online Applicants

First time users to our online application system will need to create an online account.

The first time you access the online system to begin an application, you will be required to set up an online account through the *My Account* portal. This account will enable you to access your application and any future applications over multiple sessions, submit and track your applications, and will be used to submit requirements and reports for grants received.

Choose the New Applicant link and you will be prompted to create an account.

The organisation representative who completes and submits the online Account Form becomes the designated 'account holder' for this application and any future applications.

Email Tip: We strongly recommend using a generic organisation email for this online account, rather than a personal email address as staff may change in the course of a project, or for subsequent applications. (e.g. admin@orgname.org.au).

Password Tip: If colleagues will be contributing to your application, use a password that you are happy to share with them.

You will receive a confirmation email. Please ensure you keep the email notifying you of your account details and password for future use.

Saving your Application

You must save your form during your first session. The application form will automatically save when you move from page to page by clicking *Next*; when you move between pages using the tab, or when you choose *Save and Finish Later*.

The *Save and Finish Later* option allows you to enter information and review your application in multiple sessions before submitting it.

Returning to your Application

Only use the *My Account* portal on our website or the URL emailed to you after you saved the application to return to an application you have already started. Do not return to the *Apply Now* page on our website. This will start a new application and will not give you access to the one you have already commenced.

Tip: It is recommended that you always access the application form via *My Account*, rather than using the URL to avoid issues with the hyperlink.

My Account will take you to the account login page which will allow you to open the *My Applications* page and continue working on an online application you have started but not yet submitted. Choose *In Progress Applications* from the dropdown list on the right hand side of the page to access the link to the application you have commenced.

Avoid losing your unsaved draft or data

Your in-progress application will timeout after 60 minutes and any unsaved work will be lost. We recommend you save your work regularly by moving from page to page of the form by clicking one of the grey tabs at the top of the page or the Next button.

Make sure you click Save & Finish Later when exiting completely. You can return to complete an unfinished page at any time once saved.

We recommend drafting your responses to the questions in a separate document to copy and paste the final version into the application. A sample application form is available on our website.

Filling out the Form

It is recommended you download and print the relevant sample application form available on our website. This will allow you to see all the information required and to prepare your responses and collate the required attachments ahead of time.

We suggest that you compose your responses in a separate Word document and cut and paste to avoid the possibility of losing your work due to a dropped internet connection or accidentally closing the browser window.

The narrative sections of the form have fixed word limits. There is a word counter located at the foot of each section, which turns red when you have exceeded your word limit. You will not be able to '*Submit*' if you have exceeded the word limits.

Please use plain text only. The system software does not recognise **bold**, underline or *italics*.

Avoid using quotation marks, numbered or bulleted lists, or tables as these do not pull through into our grants management system.

Spell Check and additional information

The 'tick' icon positioned next to a text box indicates that Spell Check is available.

Click on the 'i' positioned next to a text box to obtain additional information.

When completing the Organisation Financial Details, click on the calculator icon to calculate net values. Do not enter dollar signs, commas, decimal points or cents.

Attachments

Select '*Browse*' to search your files for the documents you wish to attach, and then select '*Upload*'.

Note: Not all browsers will show an upload progress bar, and it may take some time to upload, especially for large files.

Do not move away from this page until it shows your attachment with an uploaded date and time, file size and a '*Remove*' option. You can upload more than one document at a time.

Don't leave it to the last minute to upload attachments.

Project Budget Template

The [Project Budget Template](#) may take some time to download, depending on your browser settings and is also available from the Grantseeker section of our website.

Make sure that your project budget details are accurate and realistic as you will be required to report against this budget should your application be successful.

Save a copy of the completed budget template to enable you to attach it to your online application.

You will be required to enter your project budget totals in your application form. Ensure that the totals match with the totals in your completed Project Budget Template.

Reviewing your application

There is a 'Review' button on your form. You can invite colleagues to review your application. The 'Email Draft' button allows you to email a draft of the application to a colleague for review and discussion before finalising and submitting to HMSTrust.

You can print a copy of your application using the *Printer Friendly Version* link at the top right of the screen and then use your browser's Print icon to print. When you have printed your application, close the print version window and go back to your open application window.

Online Application Sign-off

Your application is required to be reviewed and signed-off by your organisation's principal representative (CEO or equivalent, or the Advancement Office for universities). HMSTrust considers this electronic sign-off an official authority to submit the online application.

University Online Application Sign-off

All university applications require sign-off by the Advancement Office.

University research projects require an **additional** sign-off in the form of an attached letter from the Research Office endorsing the research project for consideration by HMSTrust in a particular round.

Multiple people working on an application

If you want a number of people contributing to and/or checking your application they will need your account details to login – email address and password.

You should note that only one person can edit the application at a time i.e. only one person can make changes in the saved information at one time – as well, you cannot have multiple browser pages open on the application.

If more than one person is editing the form at the same time or the form is open in multiple browser sessions on your computer, you may receive the following message: "It appears that multiple people are editing the application." You may need to shut down all browser sessions and re-open only the one application.

We strongly recommend that the PC cache is refreshed (by pressing CTRL+F5) each time someone goes to work on a shared application to ensure you are working on the latest saved version of the grant application information.

Viewing/Management options

When you are logged into your *My Account*, along with the hyperlink to your application form, there are three Action options available to the right of the link which appear as three icons:

- Transfer to a new owner
- Manage viewers
- Email a copy of the application – this allows you to email a draft of the application to a colleague for review and discussion before finalising the application and submitting it to HMSTrust.

Hold your mouse over the icons to select.

Submitting your application

Select the '*Submit*' button at the end of your application.

When your application is submitted, a confirmation page will immediately appear with a reference number. An email confirmation and a copy of the submission will also be sent to the email listed for the account holder (owner) of the application. If an email confirmation is not received, check your email junk or spam folder before contacting HMSTrust.

Submit your application early. **The application form will no longer be accessible after 12pm (midday) on the closing date**, and applications will not be accepted after this time.

Once you have submitted your application, it will move from the *In Progress Applications* to the *Submitted Applications* of your *My Account*.

Tip: Ask someone who is not familiar with the project or your organisation to read the application before you submit it – if they can understand what you are proposing, it should be easy for us to understand your proposal.

Submission error message

If you get an error message when you try to submit your application, you may not have completed all of the mandatory fields. Problem entries such as exceeding the word limit or incomplete mandatory fields, will be highlighted. Fix the entries and try again.

If no validation errors are shown and you are still unable to submit, please contact HMSTrust on 03 9999 3000 or grants@hmstrust.org.au

Working with *My Account*

A link to *My Account* is conveniently located at the top of our homepage and in the drop-down menus of the Grantees and Resources pages on our [website](#).

The account holder will be 'owner' of your HMSTrust online account and the email address provided when the Account was set up is the email address used in all correspondence relating to the online application process.

'Ownership' of applications or reporting requirements can be transferred at any time to a new designated project contact/owner via your *My Account* page.

If you already have an account, we cannot retrieve your password, however, you can request a new password. On the *My Account* login page, click on *Forgot Password?* A new password will be emailed to the current email address linked to your *My Account*.

You can change your registration email address, by logging in to *My Account* with the current registered email address and password and selecting the '*Change email/Password*' link at the top of the page.

HMSTrust is able to view the email address linked to your *My Account*, however, we have no access to the password. If you no longer have access to the registered email address, we are able to amend it upon request to a new email address and then you will be able to create a new password by following the instructions above.

Please contact us on 03 9999 3000 or grants@hmstrust.org.au if you have any issues or questions.

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