

## ADDITIONAL INFORMATION

## FINANCIAL WELLBEING AND CAPABILITY (FWC) ACTIVITY

## EMERGENCY RELIEF (ER) AND FOOD RELIEF - TIMEFRAME (AS AT 12 NOVEMBER 2018)

Deliverable	Actual Date	Brief number
FWC grant recipients notified of 12-month funding agreement extension to 30 June 2018 to allow for consultation on future of FWC Activity.	December 2016	MS16-000820
Department released a discussion paper, 'Future Directions of the Financial Wellbeing and Capability Activity' through engage.gov.au.	February 2017	
s34		
Minister Porter and Minister Tudge commissioned a review of Commonwealth funded financial management services which included Financial Wellbeing and Capability Activity	September 2017	
Interim report on review of Commonwealth funded financial management services provided to Ministers Porter and Tudge	4 December 2017	MS17-001934
Minister Porter wrote to the former Prime Minister Turnbull seeking authority to extend FWC funding agreements until 31 December 2018 to allow the FWC Activity redesign to be completed.	7 December 2017	MS17-001972
The former Prime Minister Turnbull responded to Minister Tehan agreeing to extend FWC funding agreements to 31 December 2018 with no further extension.	22 December 2017	MC17-111617
FWC grant recipients informed of 6-month extension to 31 December 2018.	January 2018	
Consultations with organisations and peak bodies on FWC future directions, including redesign, concluded.	February 2018	
Department of Finance and Attorney-General's Department agree to proposed FWC Activity redesign.	8 May 2018	
Forecast opportunity and factsheet published on Grants.gov.au advising of upcoming FWC grant round.	17 May 2018	

Deliverable	Actual Date	Brief number
Redesign of FWC Activity, including ER, agreed by Minister Tehan.	22 May 2018	MS18-000778
Noting interim report on review of Commonwealth funded financial management services agreed to send Joint letter to Prime Minister	27 May 2018	MS18-000750
The Federal Executive Council agree to amend the Financial Framework (Supplementary Powers) Regulations to provide the legislative basis for the redesigned FWC activity.	21 June 2018	
Grant Opportunity Guidelines for ER and Food Relief approved by Minister Tehan.	22 June 2018	MS18-000957 MS18-001016
Process for conducting FWC grants rounds (restricted/open) approved by Minister Tehan.	26 June 2018	MS18-000575
Grant Opportunity Guidelines for ER and Food Relief agreed for release by the Minister for Finance.	29 June 2018	MS18-001033
Letter sent to Prime Minister seeking agreement that the outcomes of the Review be addressed through existing programs of work, rather than requiring a return to Cabinet	30 June 2018	MS18-001013
Grant Round Management Plan signed.	12 July 2018	
Grant Round Opens	12 July 2018	
Cabinet Secretary agrees on behalf of Prime Minister that the Review of Financial Management Services no longer needs to be brought forward to Cabinet	9 August 2018	MC18-091046
Grant Round Closes.	22 August 2018	
Pre Assessment including eligibility and compliance checks.	23 August – 6 September 2018	
Information brief provided to Minister Fletcher advising of the tight turnaround required to complete the Financial Wellbeing and Capability Activity before January 2019	11 September 2018	MB18-001041
Applications assessed and moderated.	7 - 21 September 2018	
Expert Panel Meeting convened	24 - 26 September 2018 / 3 October 2018	

<b>Deliverable</b>	<b>Actual Date</b>	<b>Brief number</b>
Expert Panel ER and Food Relief Report finalised and cleared by Panel members.	4 -12 October 2018	
Final ER and Food Relief Assessment Report approved and provided to Program Area.	15 October 2018	
Outcomes of ER and Food Relief grant rounds provided to Minister Fletcher with critical date of 5 November 2019	19 October	MS18-001679
Spending Minute signed by departmental delegate.	8 November 2019	

**FINANCIAL WELLBEING AND CAPABILITY (FWC) ACTIVITY - TIMEFRAME (WORKING AS AT 7 NOVEMBER 2018)**

Deliverable	Actual Date
FWC grant recipients notified of 12-month funding agreement extension to 30 June 2018 to allow for consultation on future of FWC Activity.	December 2016
Department released a discussion paper, 'Future Directions of the Financial Wellbeing and Capability Activity' through engage.gov.au.	February 2017
s34	
Minister Porter wrote to the former Prime Minister Turnbull seeking authority to extend FWC funding agreements until 31 December 2018 to allow the FWC Activity redesign to be completed.	7 December 2017
The former Prime Minister Turnbull responded to Minister Tehan agreeing to extend FWC funding agreements to 31 December 2018 with no further extension.	22 December 2017
FWC grant recipients informed of 6-month extension to 31 December 2018.	January 2018
Consultations with organisations and peak bodies on FWC future directions, including redesign, concluded.	February 2018
Department of Finance and Attorney-General's Department agree to proposed FWC Activity redesign.	8 May 2018
Forecast opportunity and factsheet published on Grants.gov.au advising of upcoming FWC grant round.	17 May 2018
Redesign of FWC Activity, including ER, agreed by Minister Tehan.	22 May 2018
The Federal Executive Council agree to amend the Financial Framework (Supplementary Powers) Regulations to provide the legislative basis for the redesigned FWC activity.	21 June 2018
Grant Opportunity Guidelines for ER approved by Minister Tehan.	22 June 2018
Process for conducting FWC grants rounds (restricted/open) approved by Minister Tehan.	26 June 2018
Grant Opportunity Guidelines for ER agreed for release by the Minister for Finance.	29 June 2018
Letter sent to current providers (including a factsheet) advising of the redesign and grants rounds.	11 July 2018
Grant Round Management Plan signed.	12 July 2018
Grant Round Opens.	12 July 2018

Deliverable	Actual Date
Grant Round Closes.	22 August 2018
Pre Assessment including eligibility and compliance checks.	23 August – 6 September 2018
Applications assessed and moderated.	7 - 21 September 2018
Expert Panel Meeting convened	24 - 26 September 2018 / 3 October 2018
Expert Panel ER and Food Relief Report finalised and cleared by Panel members.	4 -12 October 2018
Final ER and Food Relief Assessment Report approved and provided to Program Area.	15 October 2018
Outcomes of ER and Food Relief grant rounds provided to Minister Fletcher with critical date of 5 November 2019 (MS18-001679).	19 October
Spending Minute signed by departmental delegate (subject to MS18-001679).	5 November 2019
Outcome Notifications Issued.	8 - 14 November 2018
Finalise Agreements.	8 - 12 November 2018
Data Entry.	13 - 22 November 2018
Issue Agreements.	23 – 29 November 2018
10 day Negotiation.	30 November - 13 December 2018
Agreements Executed.	14 – 20 December 2018



Attachment A

Restricted Rounds

Selection Phase		Initial Dates	Revised Dates
Client training of assessors / moderators	Community Grants Hub / Client Agency	26 July to 8 August 2018	Complete
Applications assessed and moderated	Community Grants Hub	27 August 2018	Complete
Shell agreements approved	Client Agency	10 September 2018	Complete
Assessment Report drafted and approved	Community Grants Hub	30 August 2018	Complete
Delegate approval of Grant Round outcomes (including consultation with the Minister's Office)	Client Agency	31 August to 13 September 2018	31 August to <b>25 September 2018</b>
Nomination of five staff to be trained to assist the Transitions Team in the Establish Phase	Client Agency	13 September 2018	13 September 2018
<b>Additional Task</b> – Script for Funding Arrangement Managers to contact successful applicants approved and provided to the Hub	Client Agency		<b>21 September 2018</b> Complete
<b>Additional Task</b> - Funding Arrangement Managers to contact successful applicants regarding pro-rata funding	Community Grants Hub		<b>26 - 28 September 2018</b>
Successful notifications issued	Community Grants Hub	19 September 2018	<b>28 September to 3 October 2018</b>

<b>Establishment Phase</b> <i>This is on the basis that Providers return signed Agreements within 20 business days, rather than the 30 business days that is usually allocated.</i>		<b>Initial Dates</b>	<b>Revised Dates</b>
Agreements issued in line with endorsed plan provided by Agreement Creation Team	Community Grants Hub	10 October 2018	19 - 25 October 2018
Agreements negotiated and executed	Community Grants Hub	14 November 2018	29 November 2018



Australian Government

**Community Grants Hub**  
 Improving your grant experience



Attachment A

	CFCF&FC and FCH	Emergency Relief and Food Relief
<b>Ministerial sign off</b> We note the client is hoping to have the delegate sign off earlier, but that has not been our previous experience	22 October 2018 <b>previously planned 17 October</b>	5 November 2018 <b>previously planned 29 October</b>
<b>Delegate sign off</b>	23 October 2018	6 November 2018
<b>Calls to successful applicants and unsuccessful providers (Client)</b>	23 October -26 October 2018	
<b>Provision of Script for complaints fielded by the Transitions Team &amp; the Hotline</b>	1 November 2018	1 November 2018 assuming we can use the same script for both?
<b>Outcome Notifications Issued (by Hub)</b>	26 October – 1 November 2018	8 - 14 November 2018
<b>Finalise Agreements</b>	30 October – 1 November 2018	23 - 12 November 2018
<b>Data Entry</b>	2 – 13 November 2018	13 - 22 November 2018
<b>Issue Agreements</b>	14 – 20 November 2018	23 – 29 November 2018
<b>10 day Negotiation</b>	21 November - 4 December 2018	30 November - 13 December 2018
<b>Agreements Executed</b>	5 – 11 December 2018 Contingent on the grant recipient returning their signed agreement by 4 December 2018	14 – 20 December 2018 Contingent on the grant recipient returning their signed agreement by 13 December 2018





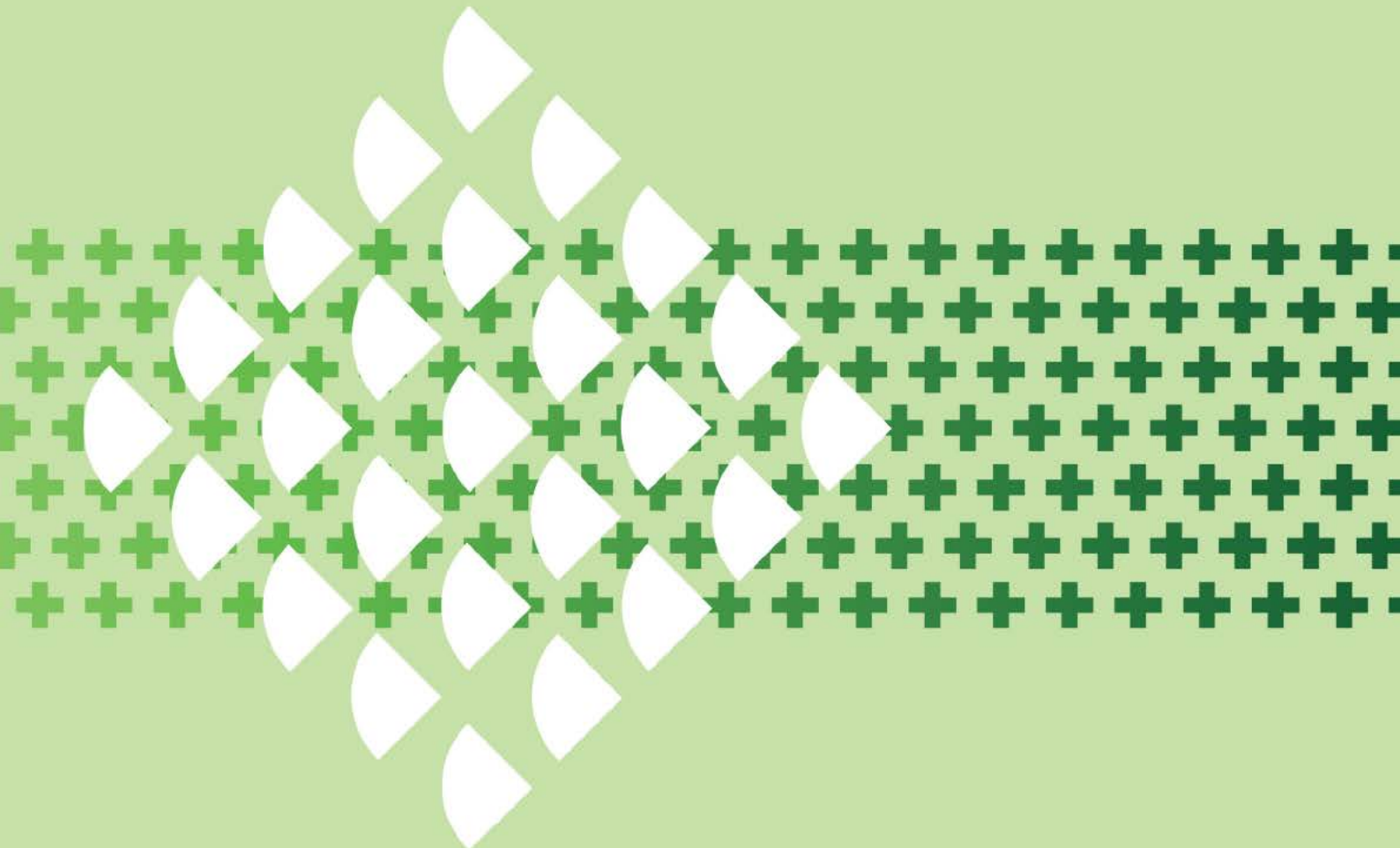
**Community  
Grants Hub**  
Improving your grant experience



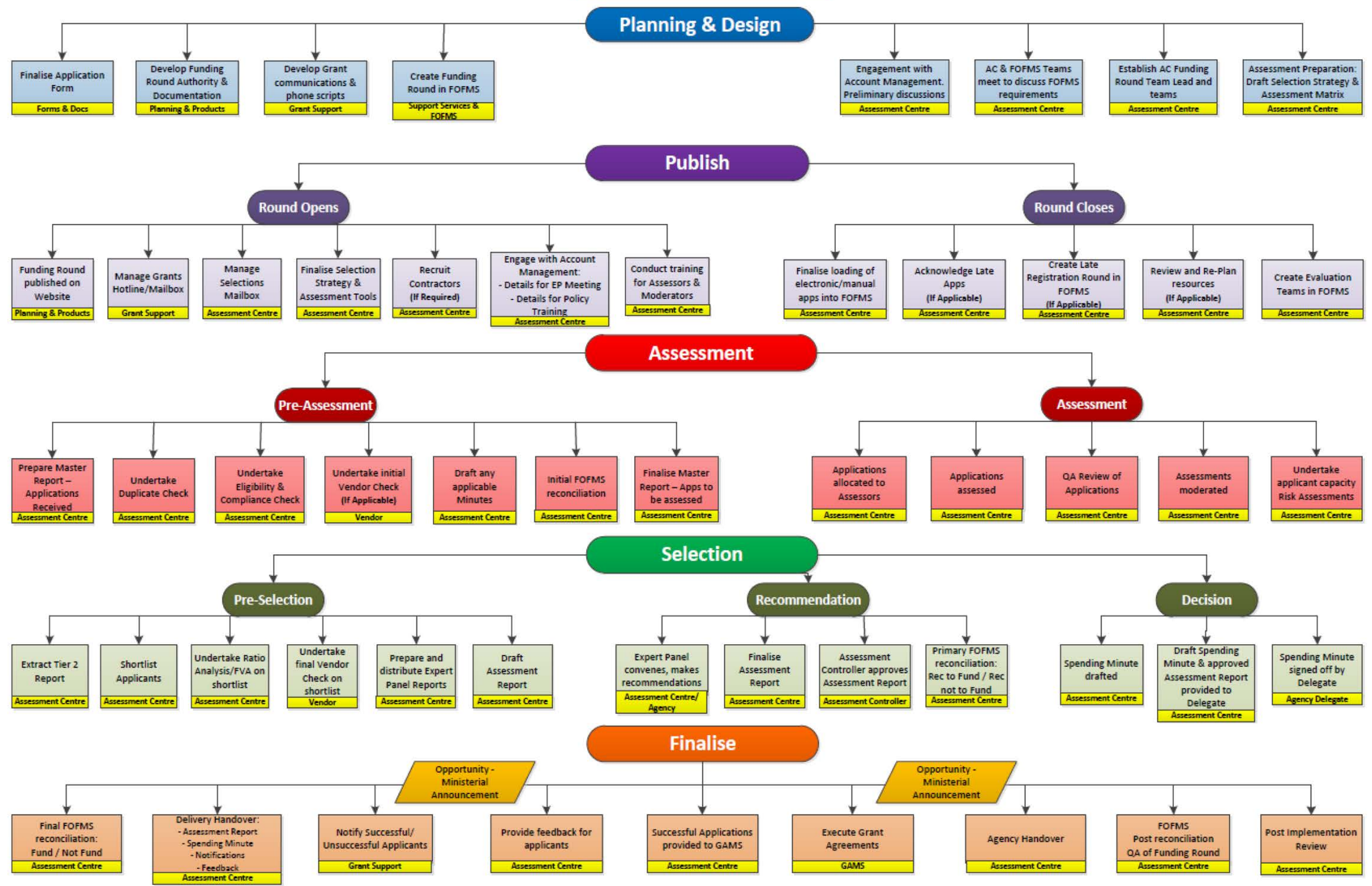
# Standard Operating Procedures Open Funding Rounds

---

August 2016



# Process Map: Open Selection Process



## Introduction

This Introductory Standard Operating Procedure (SOP) features the key phases and processes that must be managed during an Open Funding Round Selection Process. Where appropriate, links are provided to lower level SOPs that explain the process(es) in more detail.

1. Engagement with Account Management
2. Notification of new funding round
3. Setting up a new funding round
4. Assessment preparation
5. Round opens
6. Round closes
7. Pre-assessment
8. Assessment
9. Pre-selection
10. Recommendation
11. Decision
12. Finalise

Steps	Task
Step 1	<p><b>Engagement with Account Management</b></p> <p>During the design and planning phase of any funding round, the Assessment Centre should be engaged with Account Management</p> <p>The discussions should include:</p> <ul style="list-style-type: none"> <li>• The appropriate selection process</li> <li>• Scheduling and timeframes</li> <li>• Assessment Centre resourcing</li> <li>• Governance – Expert Panel format</li> <li>• Input to Funding Round Summary (and Application Form if necessary)</li> <li>• Ministerial announcement</li> </ul>
Step 2	<p><b>Notification of a new funding round</b></p> <p>This process is carried out whenever a new funding round is going to open. The Selection Mailbox receives the Tracker ID and then the Selection Process Pack is received prior to the funding round opening.</p> <p>Refer to SOP – <a href="#">Selection Mailbox</a></p>
Step 3	<p><b>Setting up a new funding round in FOFMS</b></p> <p>Once the Assessment Centre has received confirmation that a funding round is opening:</p> <ul style="list-style-type: none"> <li>• Set up funding round in FOFMS</li> <li>• Assign the funding round to an Assessment Team</li> <li>• Set up the Assessment Team as Funding Round Managers</li> </ul> <p>Refer to Taskcard – <a href="#">Adding Staff to a Funding Round</a></p>
Step 4	<p><b>Assessment preparation</b></p> <p>The Assessment Centre is responsible for preparing internal documentation which outlines the strategy for managing the selection process and supports the assessment process. The following documents are drafted:</p> <ul style="list-style-type: none"> <li>• Selection Strategy</li> <li>• Assessment Matrix</li> </ul> <p>Refer to SOP – <a href="#">Preparing Assessment Documentation</a></p>
Step 5	<p><b>Round opens</b></p>

Steps	Task
	<p>The application period is usually 6 weeks but can be shorter. During this period, the Grant Support team manages the majority of queries from applicants but some communication will be managed by the Assessment Centre through the Selections Mailbox.</p> <ul style="list-style-type: none"> <li>• The Assessment Centre will also:</li> <li>• finalise the Selection Strategy</li> <li>• finalise the Assessment Matrix</li> <li>• finalise the Assessment tool</li> <li>• finalise resources, Task cards and Workbooks</li> <li>• Confirm training schedule and requirements</li> <li>• Engage and train assessors and moderators</li> </ul> <p>Refer to SOP – <a href="#">Selection Mailbox</a></p> <p>Refer to SOP – <a href="#">Preparing Assessment Documentation</a></p> <p>Refer to SOP – <a href="#">Expert Panel – Formal</a></p> <p>Refer to SOP – <a href="#">Training</a></p>
Step 6	<p><b>Round closes</b> (all of the following steps may not be necessary once the new application process has been confirmed)</p> <p>Once the funding round closes, no more applications can be submitted and the final number of applications can be determined</p> <ul style="list-style-type: none"> <li>• Finalise number of applications submitted</li> <li>• Acknowledge late applications submitted</li> <li>• Ensure all applications are loaded into FOFMS (manual apps etc)</li> <li>• Review Assessment Centre resourcing based on the final number of applications</li> <li>• Create Evaluation Teams in FOFMS</li> </ul> <p>Refer to SOP – <a href="#">Selection Mailbox</a></p> <p>Refer to SOP – <a href="#">Applications received – Master</a></p> <p>Refer to Taskcard - <a href="#">Submitting an emailed application using a Smart Form</a></p> <p>Refer to Taskcard - <a href="#">Submitting a paper application using a Smart Form</a></p> <p>Refer to Taskcard - <a href="#">Manually entering applications for Direct funding rounds</a></p> <p>Refer to SOP – <a href="#">Late Applications</a></p> <p>Refer to Taskcard – <a href="#">Creating an Evaluation Team</a></p> <p>Refer to Taskcard – <a href="#">Adding staff to an Evaluation Team</a></p>
Step 7	<p><b>Pre-assessment</b></p> <p>During the pre-assessment phase, all applications are thoroughly checked and prepared for assessment:-</p> <ul style="list-style-type: none"> <li>• Prepare Master Report – all applications received</li> <li>• Identify duplicate applications</li> <li>• Undertake organisation eligibility and compliance checks</li> <li>• Arrange for initial vendor checks (if required)</li> <li>• Undertake grant eligibility checks (if applicable)</li> <li>• Prepare Minutes for clearance ( e.g. duplicate apps, late apps)</li> <li>• Initial FOFMS reconciliation</li> <li>• Finalise Master Report - all applications to be assessed</li> </ul> <p>Refer to SOP – <a href="#">Selection Mailbox</a></p> <p>Refer to SOP – <a href="#">Eligibility and Compliance</a></p> <p>Refer to SOP – <a href="#">Duplicates and Similar Applications</a></p> <p>Refer to SOP – <a href="#">Applications received – Master</a></p> <p>Refer to SOP – <a href="#">Reconciliation</a></p>

Steps	Task
Step 8	<p><b>Assessment</b></p> <p>Once the list of eligible applications has been finalised, the applications can be allocated to assessors and assessment can commence:-</p> <ul style="list-style-type: none"> <li>• Allocate applications to assessors</li> <li>• Assess applications</li> <li>• QA review of applications</li> <li>• Moderate assessments</li> <li>• Applicant Capacity Risk Assessments (to be confirmed)</li> </ul> <p>Refer to FOFMS Task Card – <a href="#">Assessing Applications</a></p> <p>Refer to FOFMS Task Card – <a href="#">Applications Re-assessment - Partial</a></p> <p>Refer to FOFMS Task Card – <a href="#">Applications Re-assessment - Full</a></p> <p>Refer to FOFMS Task Card – <a href="#">Moderation of Assessments</a></p> <p>Refer to FOFMS Task Card – <a href="#">QA Review</a></p> <p>Refer to SOP – <a href="#">Applicant Capacity Risk Assessment (to be confirmed)</a></p>
Step 9	<p><b>Pre- selection</b></p> <p>Once all applications have been fully assessed, QA reviewed and moderated, applicants can be shortlisted for consideration by the Expert Panel:-</p> <ul style="list-style-type: none"> <li>• Extract Tier 2 Report from FOFMS</li> <li>• Shortlist applicants suitable for funding</li> <li>• Undertake financial viability on shortlisted applicants</li> <li>• Arrange for final vendor check on shortlisted applicants</li> <li>• Prepare and distribute draft Expert Panel Report</li> <li>• Finalise Expert Panel meeting details and requirements</li> <li>• Prepare draft Assessment Report</li> </ul> <p>Refer to SOP – <a href="#">Applications Received – Master</a></p> <p>Refer to SOP - <a href="#">Prepare Expert Panel Data</a></p> <p>Refer to SOP – <a href="#">Preparing the Expert Panel Report</a></p> <p>Refer to SOP – <a href="#">Preparing the Assessment Report and Spending Minute</a></p> <p>Refer to SOP – <a href="#">Financial Viability Analysis</a></p>
	<p><b>Recommendation</b></p> <p>An Expert Panel is convened for the purposes of selecting the applicants that they recommend for funding:-</p> <ul style="list-style-type: none"> <li>• Expert Panel selects applicants recommended for funding</li> <li>• Expert Panel report updated with applicants recommended to fund, amount of funding to be offered and any conditions of funding</li> <li>• Finalise the Expert Panel Report and include/attach details to the Assessment Report</li> <li>• Finalise the Assessment Report for approval by the Assessment Controller</li> <li>• Once the Assessment Report has been approved, undertake primary FOFMS reconciliation to reflect the recommendations</li> </ul> <p>Refer to SOP – <a href="#">Expert Panel - Formal</a></p> <p>Refer to SOP – <a href="#">Expert Panel – Informal</a></p> <p>Refer to SOP – <a href="#">Preparing the Expert Panel Report</a></p> <p>Refer to SOP – <a href="#">Preparing the Assessment Report and Spending Minute</a></p> <p>Refer to SOP – <a href="#">Reconciliation</a></p>
	<p><b>Decision</b></p> <p>Once the outcome of the Expert Panel meeting is known the recommendations can be forwarded to the Delegate for a decision. The Delegate can overturn the recommendations but will need to provide justification for doing so:-</p>

Steps	Task
	<ul style="list-style-type: none"> <li>• Draft the Spending Minute for approval by the Delegate</li> <li>• Forward the draft Spending Minute and approved Assessment Report to the Delegate</li> <li>• Spending Minute is signed off by the Delegate</li> </ul> <p>Refer to SOP – <a href="#">Preparing the Assessment Report and Spending Minute</a></p>
	<p><b>Finalise</b></p> <p>When the Delegate has made their decision, there are a number of steps to finalise the selection process:-</p> <ul style="list-style-type: none"> <li>• Undertake final reconciliation of FOFMS to reflect the decision of the Delegate</li> <li>• Provide documentation for Delivery handover</li> <li>• Notify applicants of the selection outcome</li> <li>• Provide applicant feedback</li> <li>• Provide successful applications for the Grant Agreement Managers (GAMS)</li> <li>• Provide documentation for Agency handover</li> <li>• Undertake FOFMS post-reconciliation QA of the funding round</li> <li>• Undertake Post Implementation Review</li> </ul> <p>Refer to SOP - <a href="#">Notification for Applicants</a></p> <p>Refer to SOP – <a href="#">Providing Feedback to Applicants</a></p> <p>Refer to SOP – <a href="#">Reconciliation</a></p>



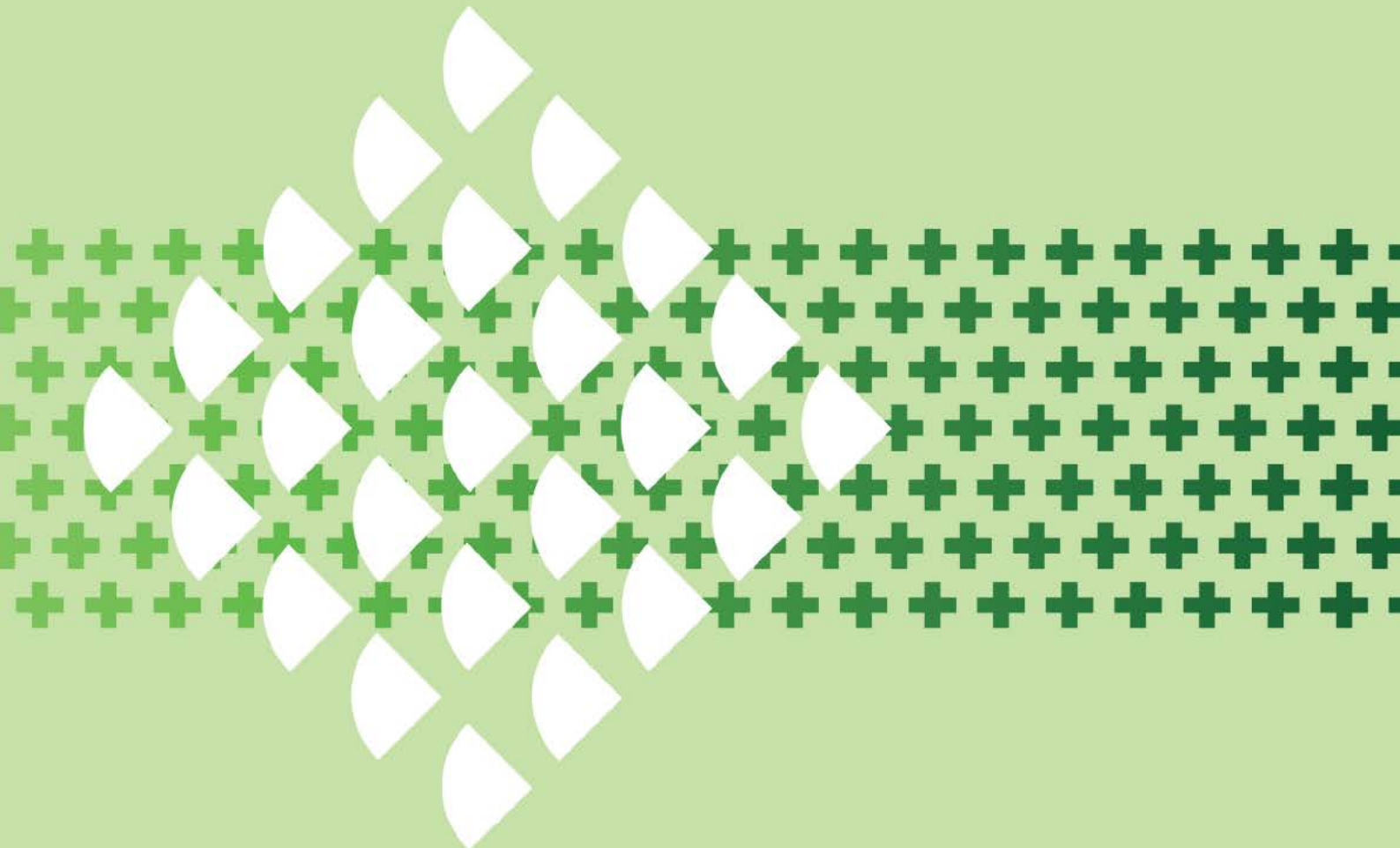
**Community  
Grants Hub**  
Improving your grant experience



# Standard Operating Procedure Assessment Documentation

---

November 2016



This Standard Operating Procedure explains how to:

1. draft the Assessment Matrix
2. draft the Shell Assessment Tool
3. draft individual Assessment Tools for each application.

### Assessment Matrix

The Assessment Matrix is a six-point (0-5) rating scale used by assessors to appraise each application against the nominated selection criteria, with each score corresponding to a quality rating and rating description.

### Assessment Tool

The Assessment Tool is a word document in which Assessors record the outcomes of application assessments before entering them in FOFMS.

The Assessment Tool may also be used to record additional details captured through assessment and requested by Policy for inclusion in the Expert Panel Report. Information that can be extracted directly from FOFMS (i.e. responses to specific questions in the Application Form) does not need to be captured in the Assessment Tool.

For high-volume rounds, the Open and Restricted Team creates a shell Assessment Tool, which is then used by the Assessment Centre Support Team (ACFOFMS) to create individual Assessment Tools for each application after the application period has closed. For low-volume rounds, the Tools are created by a member of the Open and Restricted Team.

### Draft Assessment Matrix

1	Open either of the Assessment Matrix templates: Template 1: ARC Document number D16/7791721 Template 2: ARC Document number D16/8620464  Save a copy in the relevant ARC funding round folder structure under Assessment → Assessment of Applications.
3	Complete the saved template. To do so, you will require the relevant Funding Round Summary located in the ARC funding round folder structure under Products → Funding Round Documents and/or on the relevant page of the <a href="#">Community Grants Hub</a> website.
3	Send an email to the Funding Round Team Leader with a link to the Assessment Matrix for review.
4	Action any suggested changes and notify the Funding Round Team Leader once complete. Alternatively, if the changes are minor, the Funding Round Team Leader may action them independently.
5	Once approved by the Funding Round Team Leader, the Assessment Matrix is sent to the relevant Policy area (for information only) attached to email template no. 3 in ARC document D16/7538081. Email template no.3 also asks Policy to provide information about the contents of the Expert Panel Report, and to nominate a date for delivery of policy training to Assessment Centre staff – seek approval from Funding Round Team Leader before sending.



### Draft Shell Assessment Tool (high-volume rounds)

- 6 Open the Assessment Tool template – ARC Document D16/7791259.  
Save a copy of the template in the relevant ARC funding round folder structure under Assessment → Assessment of Applications.
- 7 Navigate to Assessment → Communication in the relevant ARC funding round folder structure and locate Policy’s response to email template no.3 advising of additional information to be captured in the Expert Panel Report.  
Identify which additional information cannot be extracted directly from FOFMS and will therefore need to be captured by assessors in the Assessment Tool; extra fields will need to be added to the Tool accordingly.
- 8 Populate the saved copy of the template with the funding round details and add any additional fields required.  
Notify the Assessment Team Leader or Funding Round Manager once complete and action any suggested amendments.
- 9 Draft and send an email using template no. 6 in ARC Document D16/7538081 advising ACFOFMS that the shell Assessment Tool is complete and ready for use once the funding round closes.

### Create individual assessment tools for each application (low-volume rounds)

- 10 After the application period has closed, open a copy of the Applications Received spreadsheet located in the relevant ARC funding round folder structure under Pre-Assessment → Quality Assurance.
- 11 Open the Assessment Tool template – ARC Document D16/7791259.
- 12 Save a copy of the Assessment Tool template for each application received in the relevant ARC funding round folder structure under Assessment → Assessment of Applications with the naming convention Funding Round Number – Funding Round Name – Assessment Tool – Name of Applicant Organisation.
- 13 Populate and save the Assessment Tools with the details of the funding round and of each application per the Applications Received spreadsheet.



# FOFMS TASKCARD

## Assessing Applications

This task card will take an Assessor through the process of entering and completing an application assessment in FOFMS.

Contents	Page
Open the Application Record.....	2
Assess the Application .....	9
Enter the Completed Assessment into FOFMS .....	11
Logging Out of FOFMS .....	21
Need Help? .....	21

### Before you begin ensure you have:

- The FOFMS ID of the Application you will be assessing.

### FOFMS Access Required:

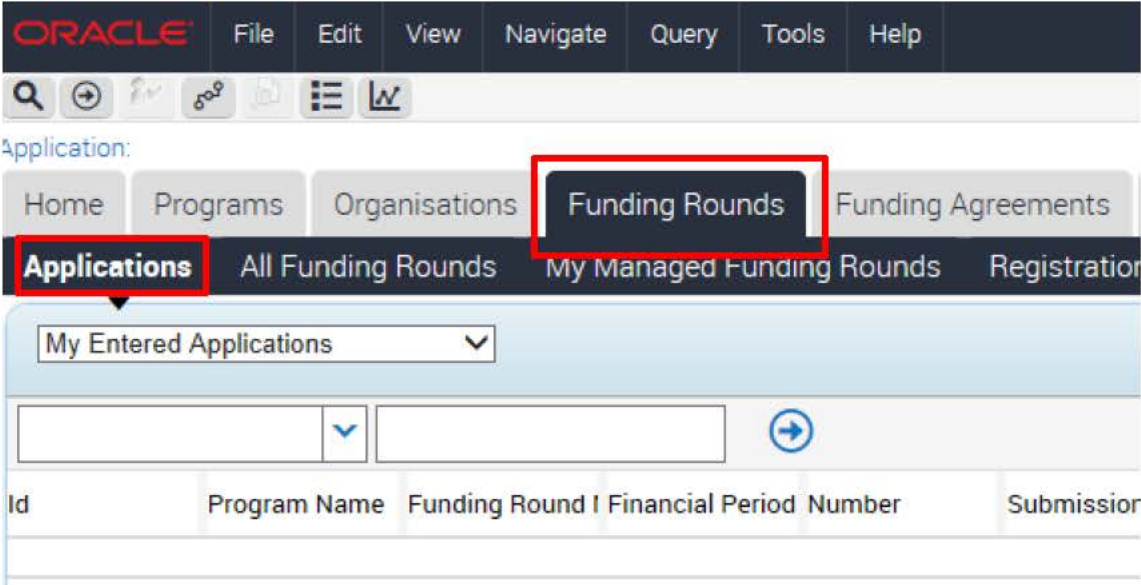
- FOFMS Application Appraiser

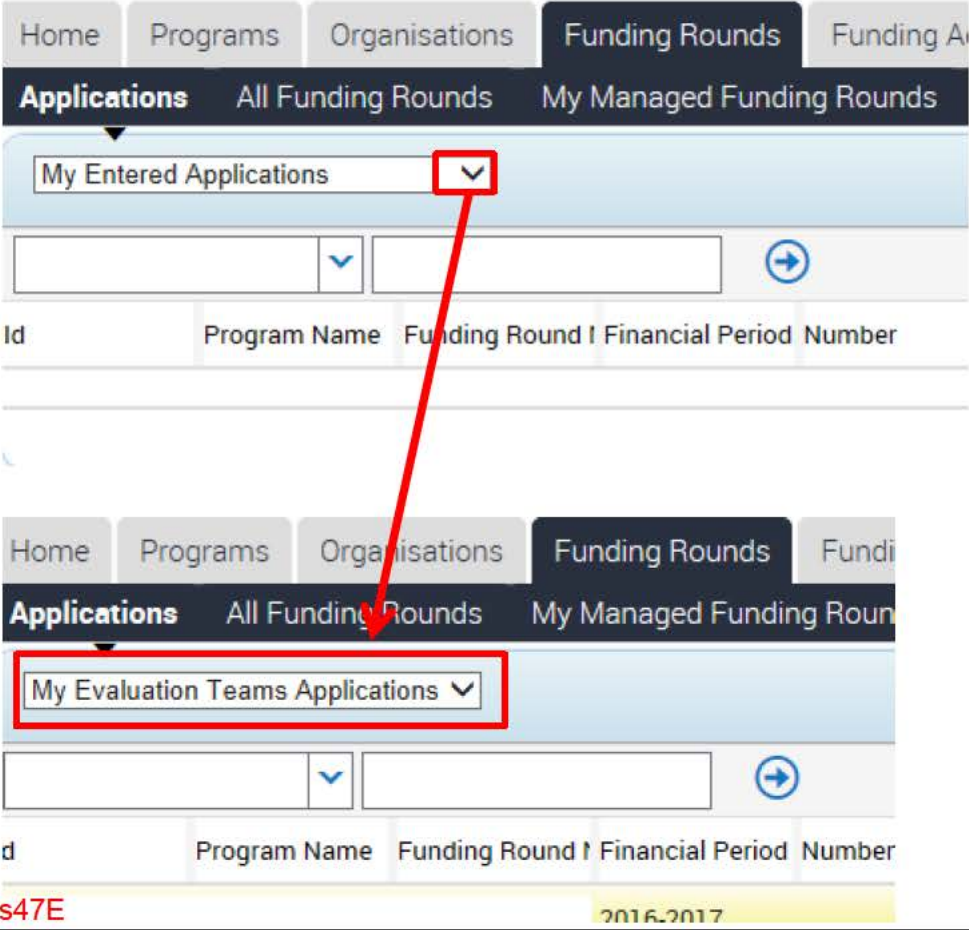
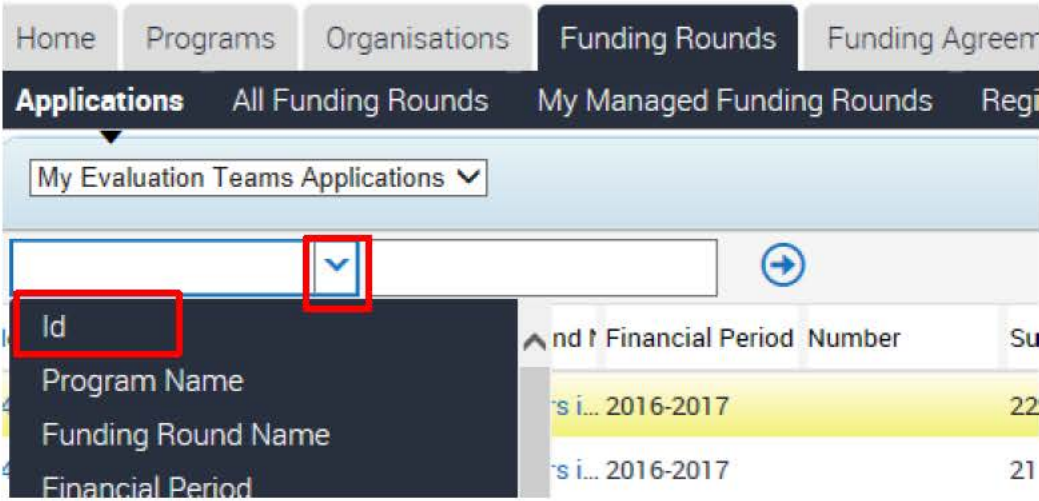
**\*If at any step you feel you have made an incorrect selection, press 'Esc' and attempt the step again. If this fails to resolve the issue, speak to your Team Leader.**


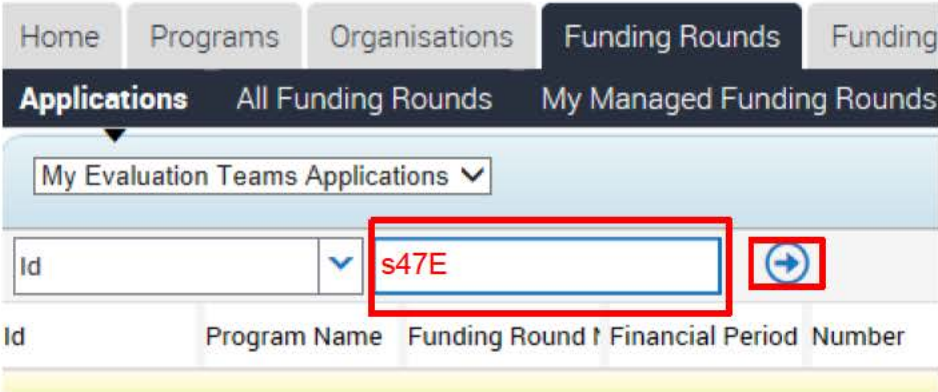

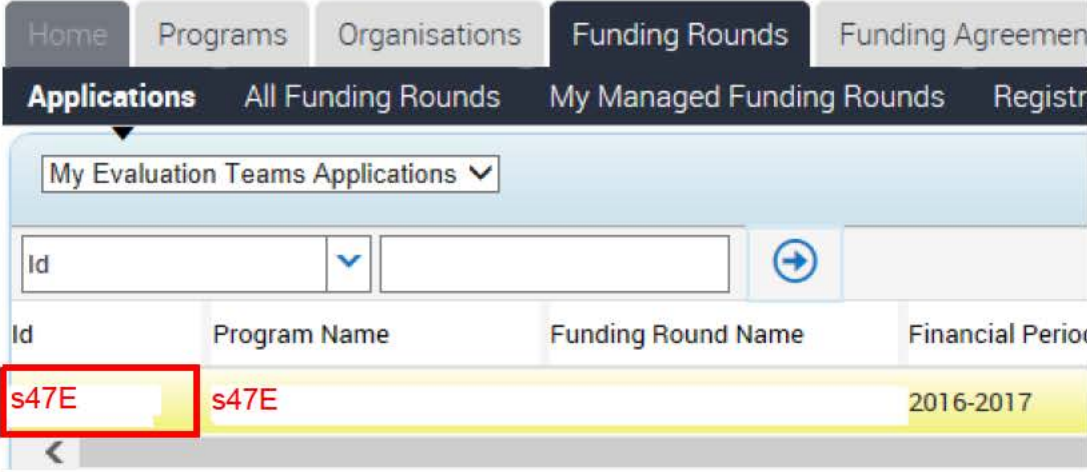

### Update Instructions For Each Funding Round

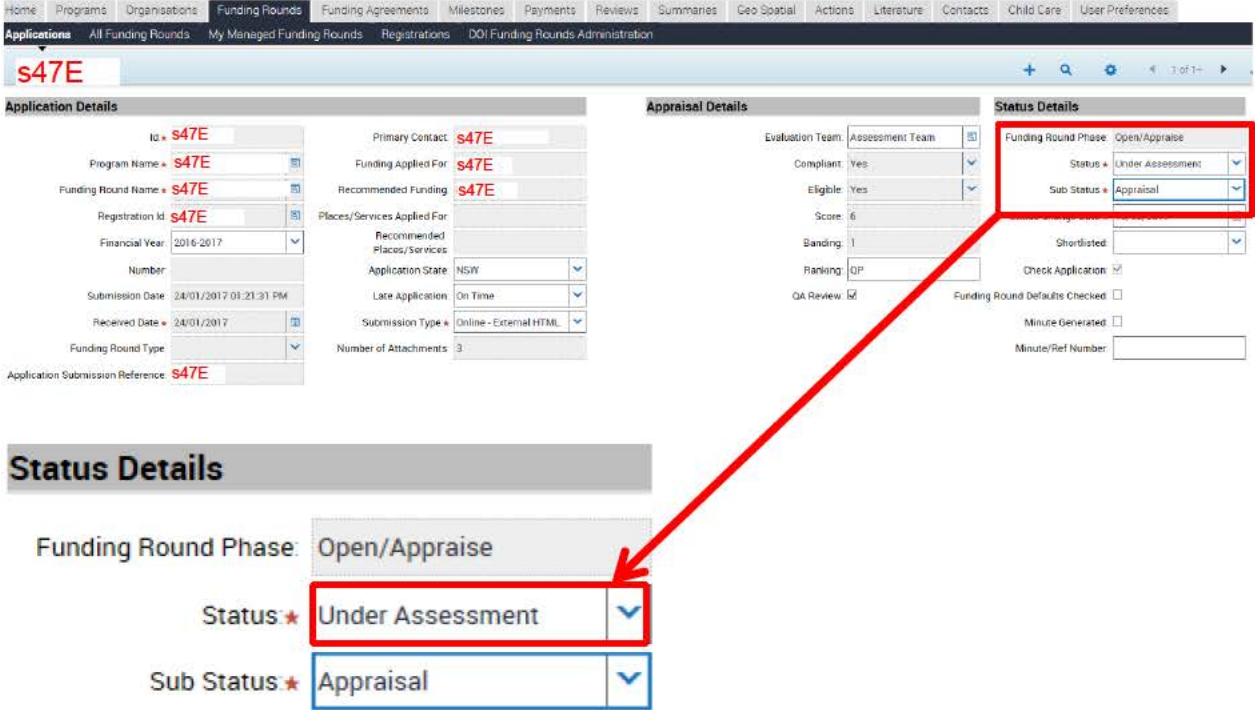
- Update Step 15 with the appropriate ARC Folder details


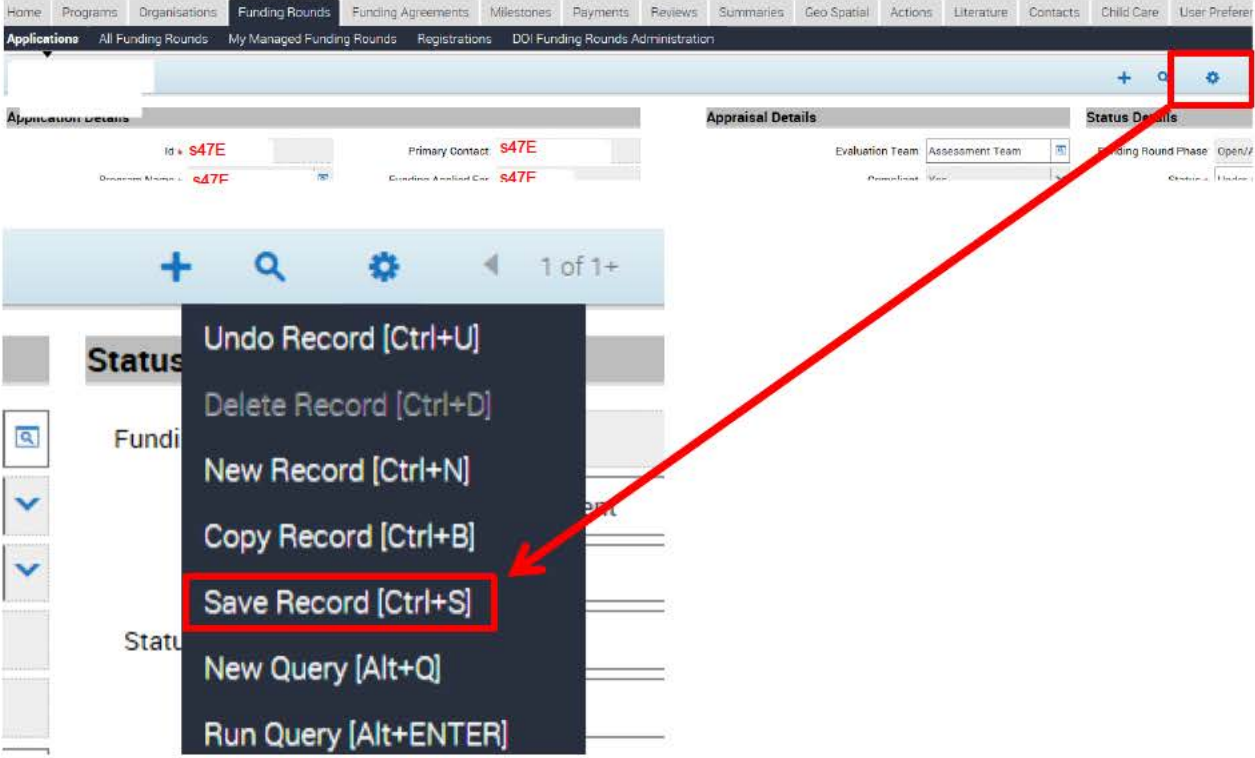
## Open the Application Record

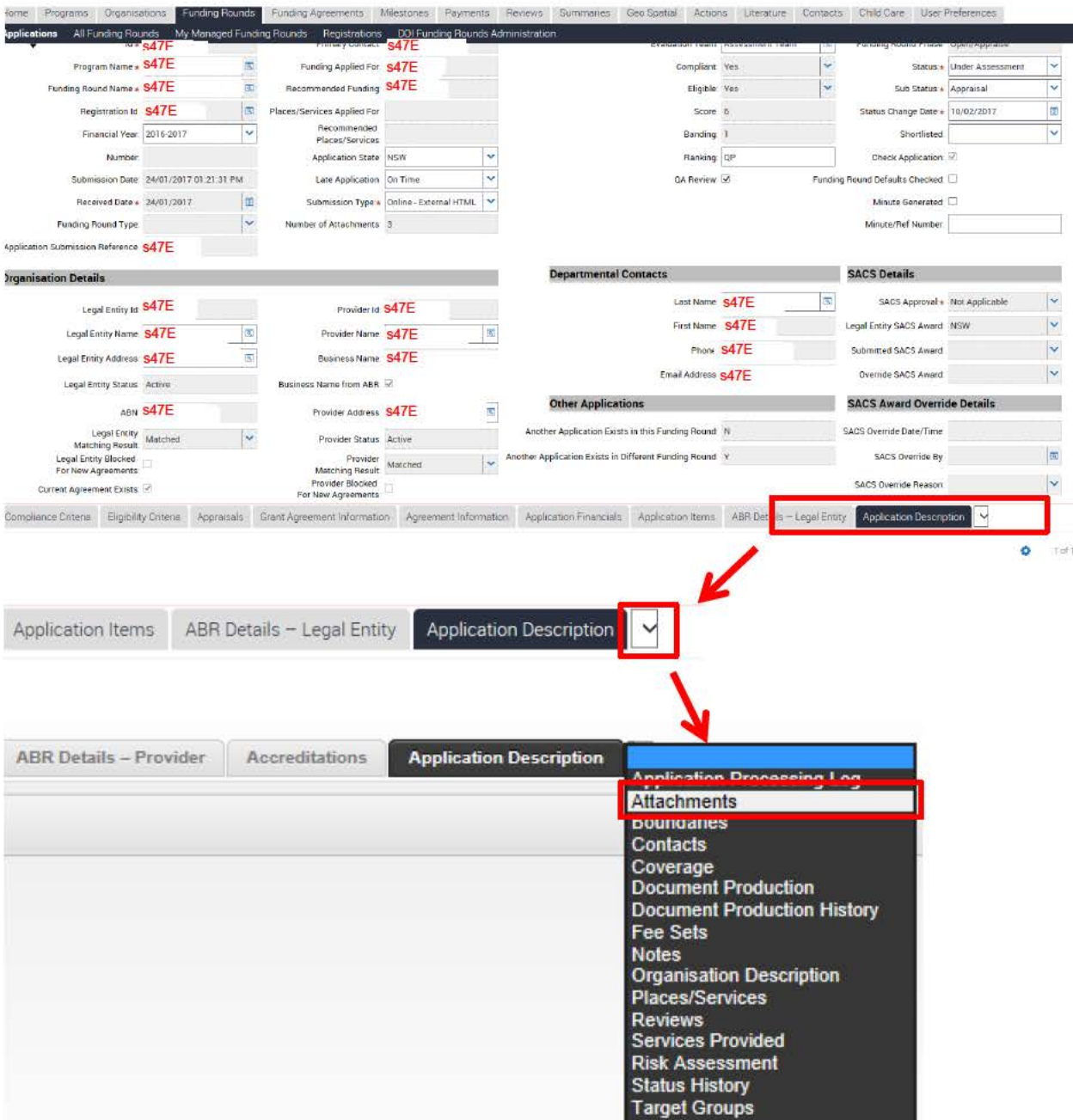
Step	Action
1	Open <b>FOFMS</b> to access the Application Record
2	<p>Click on the <b>Funding Rounds</b> tab. Click on the <b>Applications</b> link.</p>  <p>The screenshot shows the Oracle FOFMS application interface. At the top, there is a navigation bar with the Oracle logo and menu items: File, Edit, View, Navigate, Query, Tools, and Help. Below this is a search bar and a set of navigation tabs: Home, Programs, Organisations, <b>Funding Rounds</b>, and Funding Agreements. Under the 'Funding Rounds' tab, there is a sub-menu with <b>Applications</b>, All Funding Rounds, My Managed Funding Rounds, and Registration. Below the sub-menu is a dropdown menu labeled 'My Entered Applications'. At the bottom, there is a table with columns: Id, Program Name, Funding Round, Financial Period, Number, and Submission.</p>

Step	Action
3	<p>Click on the drop down menu Select <b>My Evaluation Team's Applications</b>.</p>  <p>The screenshot shows a navigation bar with tabs: Home, Programs, Organisations, Funding Rounds, and Funding Agreements. Below this is a sub-menu with 'Applications', 'All Funding Rounds', and 'My Managed Funding Rounds'. A dropdown menu is open, showing 'My Entered Applications' with a dropdown arrow highlighted by a red box. Below this is a search bar and a table with columns: Id, Program Name, Funding Round, Financial Period, and Number. A second screenshot below shows the same interface, but the dropdown menu is now set to 'My Evaluation Teams Applications', which is highlighted with a red box.</p>
4	<p>Click on the drop down menu. Select <b>Id</b>.</p>  <p>The screenshot shows the same navigation bar and sub-menu. The dropdown menu is now set to 'My Evaluation Teams Applications'. Below the search bar, a dropdown menu is expanded, showing a list of options: Id, Program Name, Funding Round Name, and Financial Period. The 'Id' option is highlighted with a red box. Below the dropdown menu is a table with columns: Id, Program Name, Funding Round, Financial Period, and Number. The table contains two rows of data, both with '2016-2017' in the Financial Period column. The first row has '22' in the Number column, and the second row has '21' in the Number column.</p>

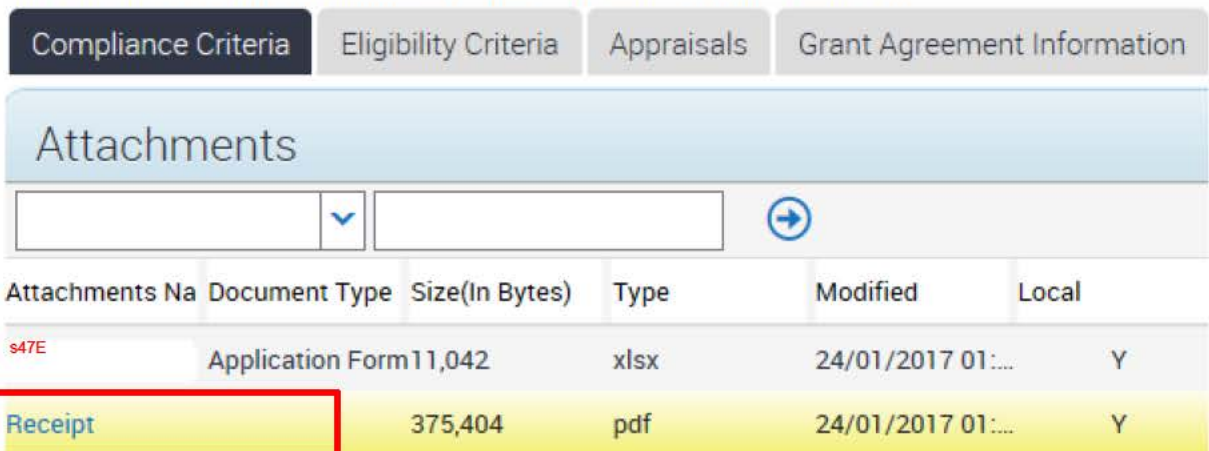
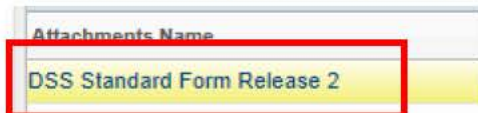
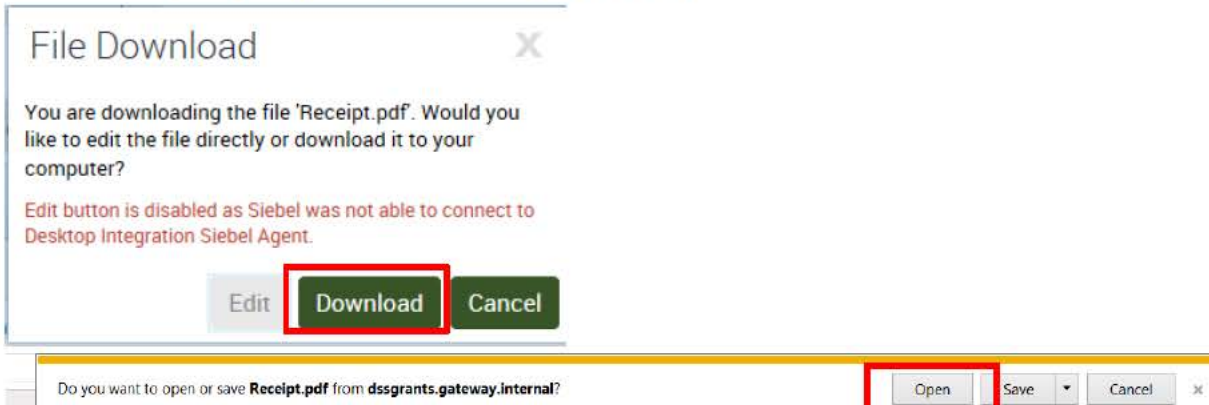
Step	Action								
5	<p>Enter the <b>Application Id</b> in the next field. Click .</p>  <p>Home Programs Organisations <b>Funding Rounds</b> Funding</p> <p><b>Applications</b> All Funding Rounds My Managed Funding Rounds</p> <p>My Evaluation Teams Applications ▾</p> <p>Id ▾ <input type="text" value="s47E"/> </p> <p>Id Program Name Funding Round ↑ Financial Period Number</p>								
6	<p>The application record will open. Click on the <b>hyperlink</b> in the <b>Id</b> column.</p>  <p>Home Programs Organisations <b>Funding Rounds</b> Funding Agreement</p> <p><b>Applications</b> All Funding Rounds My Managed Funding Rounds Registrations</p> <p>My Evaluation Teams Applications ▾</p> <p>Id ▾ <input type="text"/> </p> <table border="1"> <thead> <tr> <th>Id</th> <th>Program Name</th> <th>Funding Round Name</th> <th>Financial Period</th> </tr> </thead> <tbody> <tr> <td><a href="#">s47E</a></td> <td></td> <td>s47E</td> <td>2016-2017</td> </tr> </tbody> </table>	Id	Program Name	Funding Round Name	Financial Period	<a href="#">s47E</a>		s47E	2016-2017
Id	Program Name	Funding Round Name	Financial Period						
<a href="#">s47E</a>		s47E	2016-2017						

Step	Action
7	<p>A FOFMS application record will appear. Click on the <b>Status</b> drop down menu and select <b>Under Assessment</b> (this may already be selected).</p>  <p><b>Status Details</b></p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: <b>Under Assessment</b></p> <p>Sub Status: Appraisal</p>
8	<p>Click on the <b>Sub Status</b> drop down menu and select <b>Appraisal</b> (this may already be selected).</p> <p><b>Status Details</b></p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: Under Assessment</p> <p>Sub Status: <b>Appraisal</b></p>

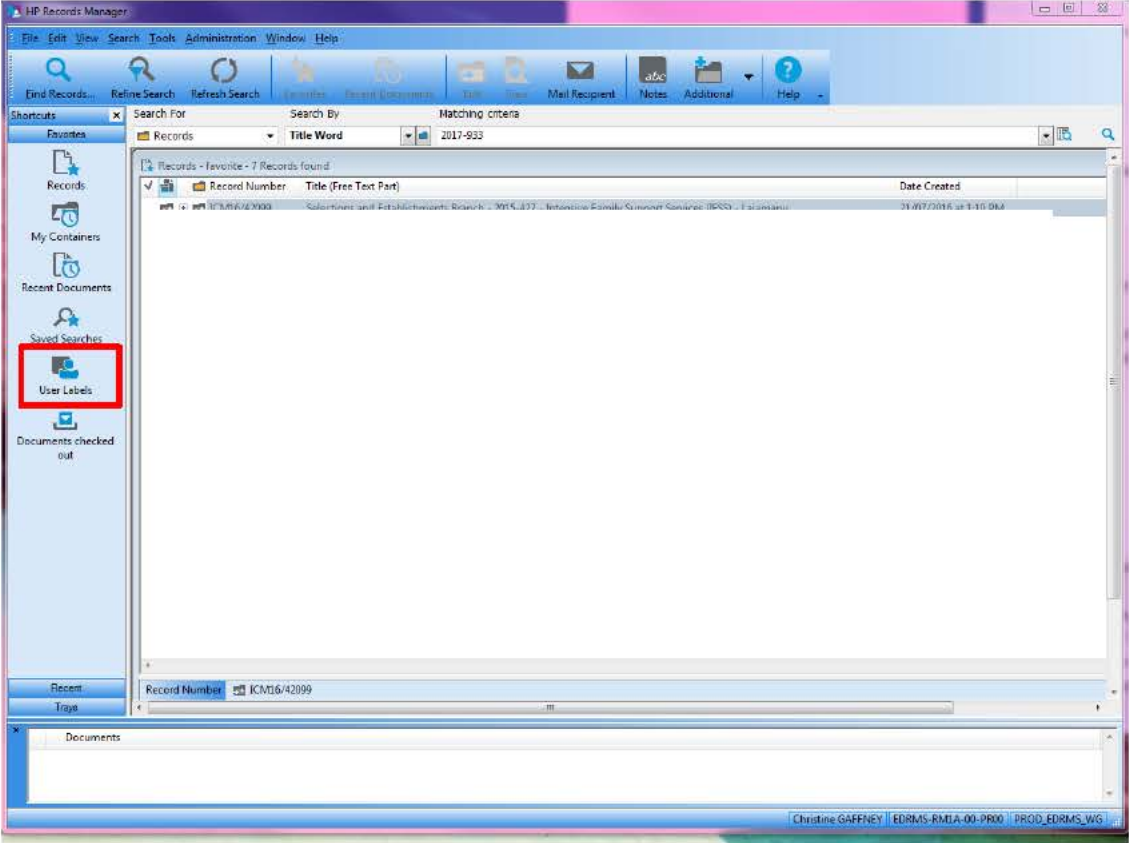
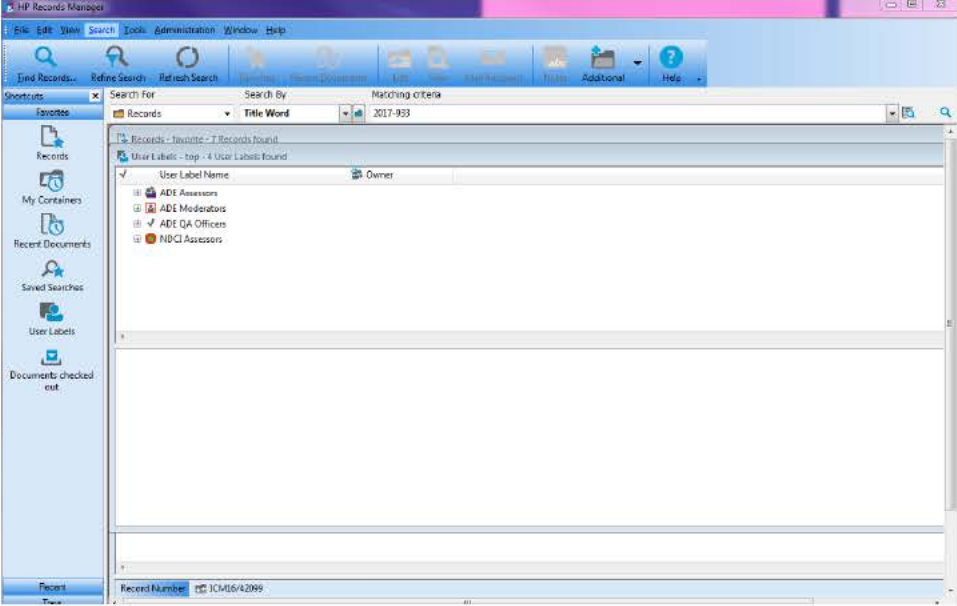
Step	Action
9	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>  <p>The screenshot shows a web application interface with a navigation bar at the top containing tabs like Home, Programs, Organisations, Funding Rounds, etc. Below the navigation bar, there are sections for 'Application Details', 'Appraisal Details', and 'Status Details'. A dropdown menu is open, listing several actions: Undo Record [Ctrl+U], Delete Record [Ctrl+D], New Record [Ctrl+N], Copy Record [Ctrl+B], Save Record [Ctrl+S], New Query [Alt+Q], and Run Query [Alt+ENTER]. The 'Save Record [Ctrl+S]' option is highlighted with a red box. A red arrow points from the gear icon in the top right of the application to the 'Save Record' option in the menu.</p>

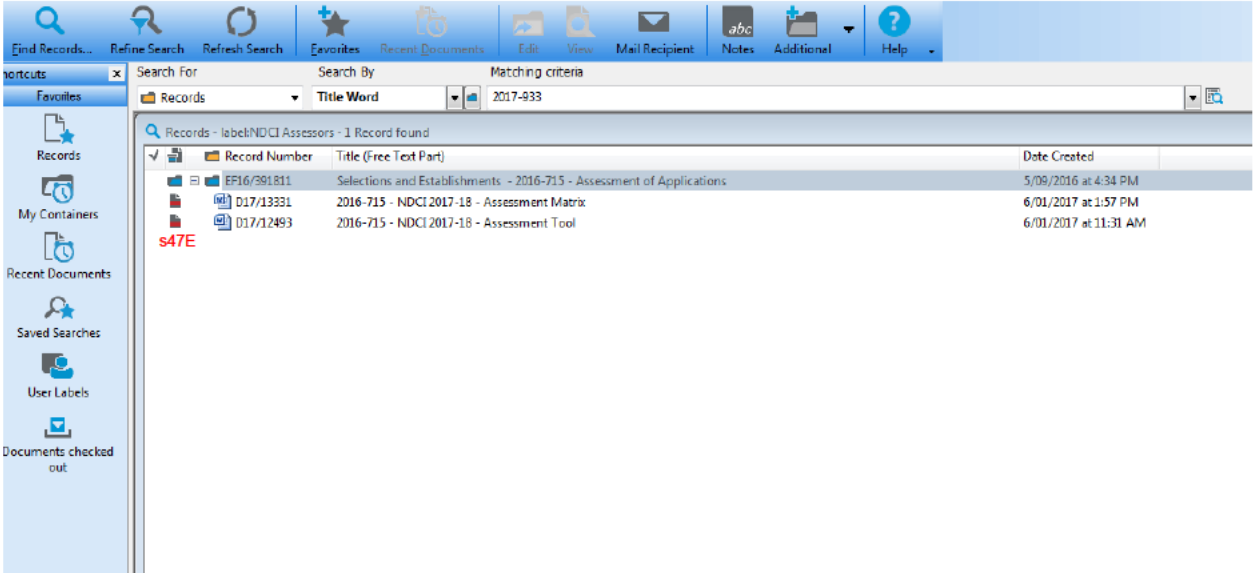
Step	Action
10	<p>Click on the <b>Attachments</b> tab.</p> <p><i>Note: If you cannot view the Attachments tab, select <b>Attachments</b> from the drop down list.</i></p>  <p>The screenshot shows a complex web interface with multiple tabs at the top: Home, Programs, Organisations, Funding Rounds, Funding Agreements, Milestones, Payments, Reviews, Summaries, Geo Spatial, Actions, Literature, Contacts, Child Care, and User Preferences. Below these are several sections for application details, including Organisation Details, Departmental Contacts, SACS Details, and SACS Award Override Details. At the bottom, there is a row of tabs: Application Items, ABR Details – Legal Entity, Application Description, and Application Processing Log. The 'Application Description' tab is selected, and a dropdown menu is open, showing a list of options including Attachments, Boundaries, Contacts, Coverage, Document Production, Document Production History, Fee Sets, Notes, Organisation Description, Places/Services, Reviews, Services Provided, Risk Assessment, Status History, and Target Groups. The 'Attachments' option is highlighted in blue. Red arrows and boxes in the image point to the dropdown arrow on the 'Application Description' tab and the 'Attachments' option in the dropdown menu.</p>



Step	Action																		
11	<p>Click on the <b>Receipt</b> hyperlink to open a copy of the Application Form.</p>  <p>The screenshot shows a web interface with tabs for 'Compliance Criteria', 'Eligibility Criteria', 'Appraisals', and 'Grant Agreement Information'. Below is an 'Attachments' section with a search bar and a table. The table has columns: Attachments Na, Document Type, Size(In Bytes), Type, Modified, and Local. The row for 'Receipt' is highlighted in yellow and has a red box around the 'Receipt' link.</p> <table border="1"> <thead> <tr> <th>Attachments Na</th> <th>Document Type</th> <th>Size(In Bytes)</th> <th>Type</th> <th>Modified</th> <th>Local</th> </tr> </thead> <tbody> <tr> <td>s47E</td> <td>Application Form</td> <td>11,042</td> <td>xlsx</td> <td>24/01/2017 01:...</td> <td>Y</td> </tr> <tr> <td><a href="#">Receipt</a></td> <td></td> <td>375,404</td> <td>pdf</td> <td>24/01/2017 01:...</td> <td>Y</td> </tr> </tbody> </table> <p>This may also appear as <b>DSS Standard Form Release 2</b>.</p>  <p>The screenshot shows a dropdown menu for 'Attachments Name' with 'DSS Standard Form Release 2' selected and highlighted in yellow, with a red box around it.</p>	Attachments Na	Document Type	Size(In Bytes)	Type	Modified	Local	s47E	Application Form	11,042	xlsx	24/01/2017 01:...	Y	<a href="#">Receipt</a>		375,404	pdf	24/01/2017 01:...	Y
Attachments Na	Document Type	Size(In Bytes)	Type	Modified	Local														
s47E	Application Form	11,042	xlsx	24/01/2017 01:...	Y														
<a href="#">Receipt</a>		375,404	pdf	24/01/2017 01:...	Y														
12	If required, open other attachments by selecting the appropriate hyperlink.																		
13	<p>The following box will open. Click <b>Download</b>, then <b>Open</b>.</p>  <p>The screenshot shows a 'File Download' dialog box with the text: 'You are downloading the file 'Receipt.pdf'. Would you like to edit the file directly or download it to your computer?'. Below this is a message: 'Edit button is disabled as Siebel was not able to connect to Desktop Integration Siebel Agent.' At the bottom are buttons for 'Edit', 'Download', and 'Cancel'. The 'Download' button is highlighted in red. Below the dialog box is another dialog box asking 'Do you want to open or save Receipt.pdf from dssgrants.gateway.internal?' with 'Open', 'Save', and 'Cancel' buttons. The 'Open' button is highlighted in red.</p>																		

## Assess the Application

Steps	Actions
14	<p>Open ARC to access the Assessment Tool and the Assessment Matrix by clicking on User Labels.</p>  <p>The screenshot shows the HP Records Manager application window. The left sidebar contains several navigation options: Records, My Containers, Recent Documents, Saved Searches, User Labels (highlighted with a red box), and Documents checked out. The main pane displays search results for 'Title Word' with a matching criteria of '2017-933'. A table with columns 'Record Number', 'Title (Free Text Part)', and 'Date Created' is visible. The status bar at the bottom indicates the user is 'Christine GAFFNEY' and the system is 'EDRMS-EMIA-00-PROD'.</p> <p>Double-click your appropriate Assessor folder.</p> <p><b>NOTE: If your User Labels are not set up, please speak with your Team Leader.</b></p>  <p>The second screenshot shows the same HP Records Manager interface, but the 'User Labels' folder in the left sidebar is now expanded. It displays a list of user labels: 'ADE Assessors', 'ADE Moderators', 'ADE QA Officers', and 'NDCl Assessors'. The main pane shows the expanded view of these labels. The status bar at the bottom shows the user is 'Christine GAFFNEY' and the system is 'EDRMS-EMIA-00-PROD'.</p>

Steps	Actions												
<p><b>15</b></p>	<p>Open the folder to access the Assessment Matrix and Assessment Tool.</p> <p><b>ARC Folder – EFXX/XXXX</b></p>  <table border="1" data-bbox="375 616 1489 728"> <thead> <tr> <th>Record Number</th> <th>Title (Free Text Part)</th> <th>Date Created</th> </tr> </thead> <tbody> <tr> <td>EF16/391811</td> <td>Selections and Establishments - 2016-715 - Assessment of Applications</td> <td>5/08/2016 at 4:34 PM</td> </tr> <tr> <td>D17/13331</td> <td>2016-715 - NDCI 2017-18 - Assessment Matrix</td> <td>6/01/2017 at 1:57 PM</td> </tr> <tr> <td>D17/12493</td> <td>2016-715 - NDCI 2017-18 - Assessment Tool</td> <td>6/01/2017 at 11:31 AM</td> </tr> </tbody> </table>	Record Number	Title (Free Text Part)	Date Created	EF16/391811	Selections and Establishments - 2016-715 - Assessment of Applications	5/08/2016 at 4:34 PM	D17/13331	2016-715 - NDCI 2017-18 - Assessment Matrix	6/01/2017 at 1:57 PM	D17/12493	2016-715 - NDCI 2017-18 - Assessment Tool	6/01/2017 at 11:31 AM
Record Number	Title (Free Text Part)	Date Created											
EF16/391811	Selections and Establishments - 2016-715 - Assessment of Applications	5/08/2016 at 4:34 PM											
D17/13331	2016-715 - NDCI 2017-18 - Assessment Matrix	6/01/2017 at 1:57 PM											
D17/12493	2016-715 - NDCI 2017-18 - Assessment Tool	6/01/2017 at 11:31 AM											
<p><b>16</b></p>	<p>Undertake the assessment using:</p> <ul style="list-style-type: none"> <li>- the Application Form</li> <li>- the Assessment Tool</li> <li>- the Assessment Matrix</li> <li>- any required attachments.</li> </ul>												

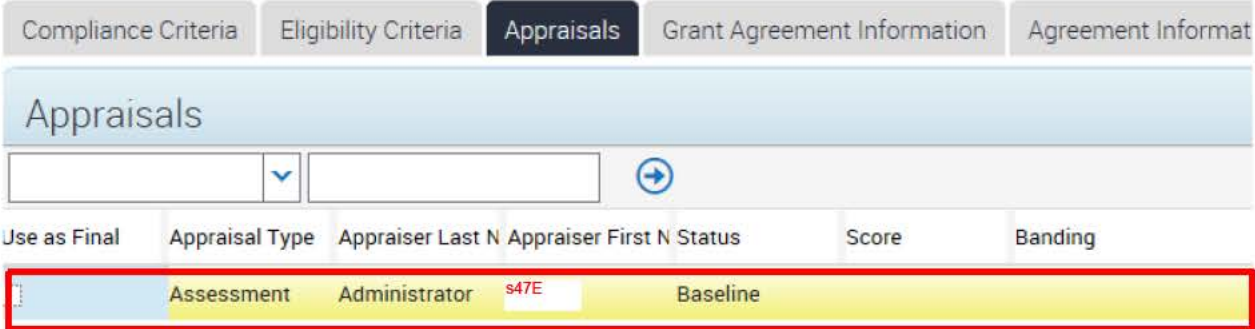

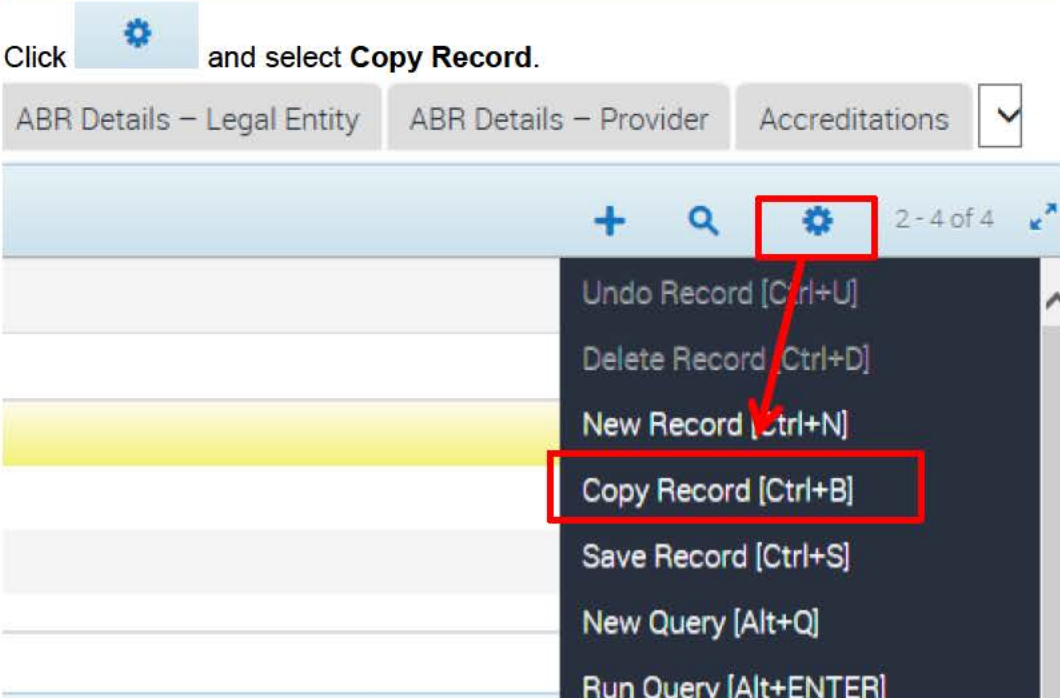
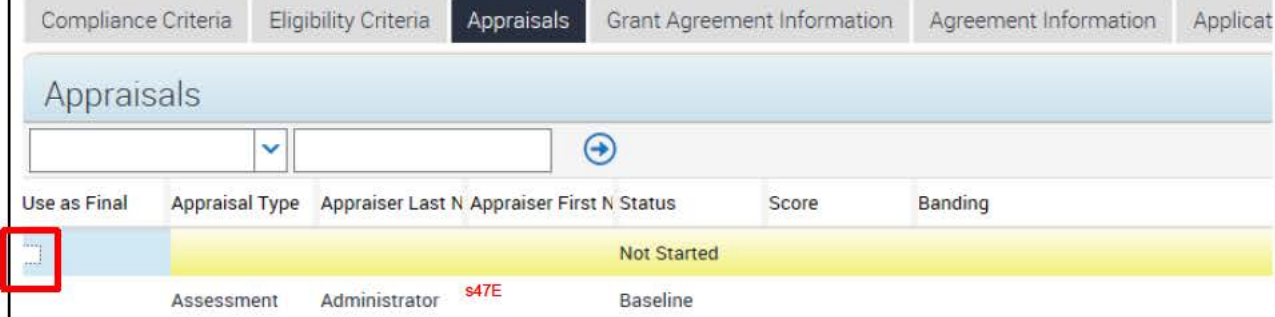
## Enter the Completed Assessment into FOFMS

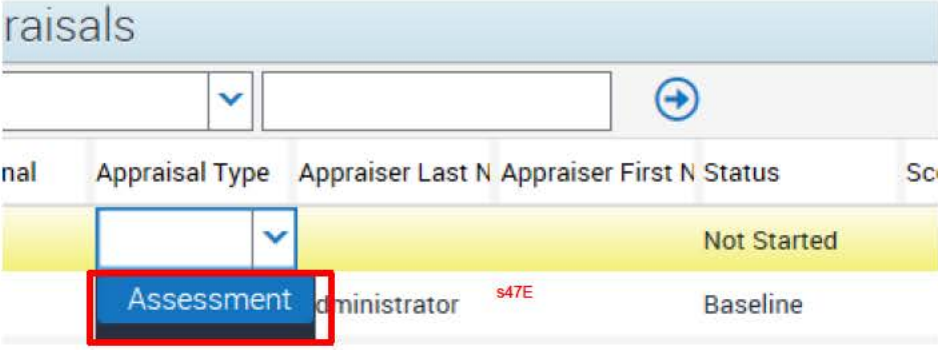

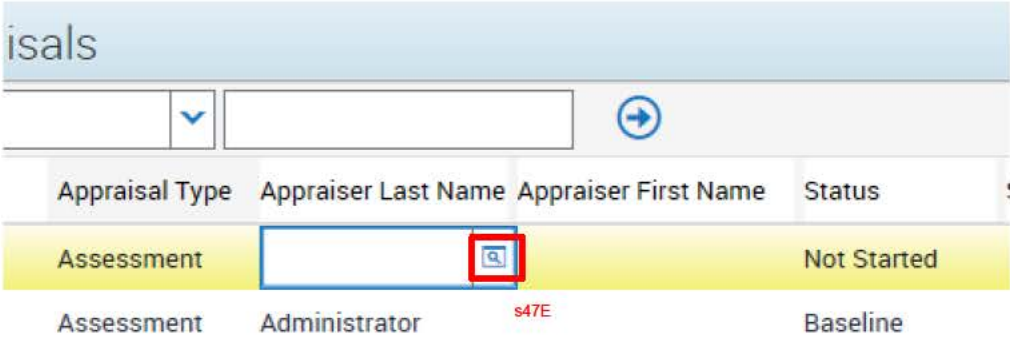
Steps	Actions
17	Open the completed <b>Assessment Tool</b> in <b>ARC</b> . Open corresponding <b>Application Record</b> in <b>FOFMS</b> .
18	Click on the <b>Appraisals</b> tab. Scroll down to the <b>Baseline Appraisal</b> record.

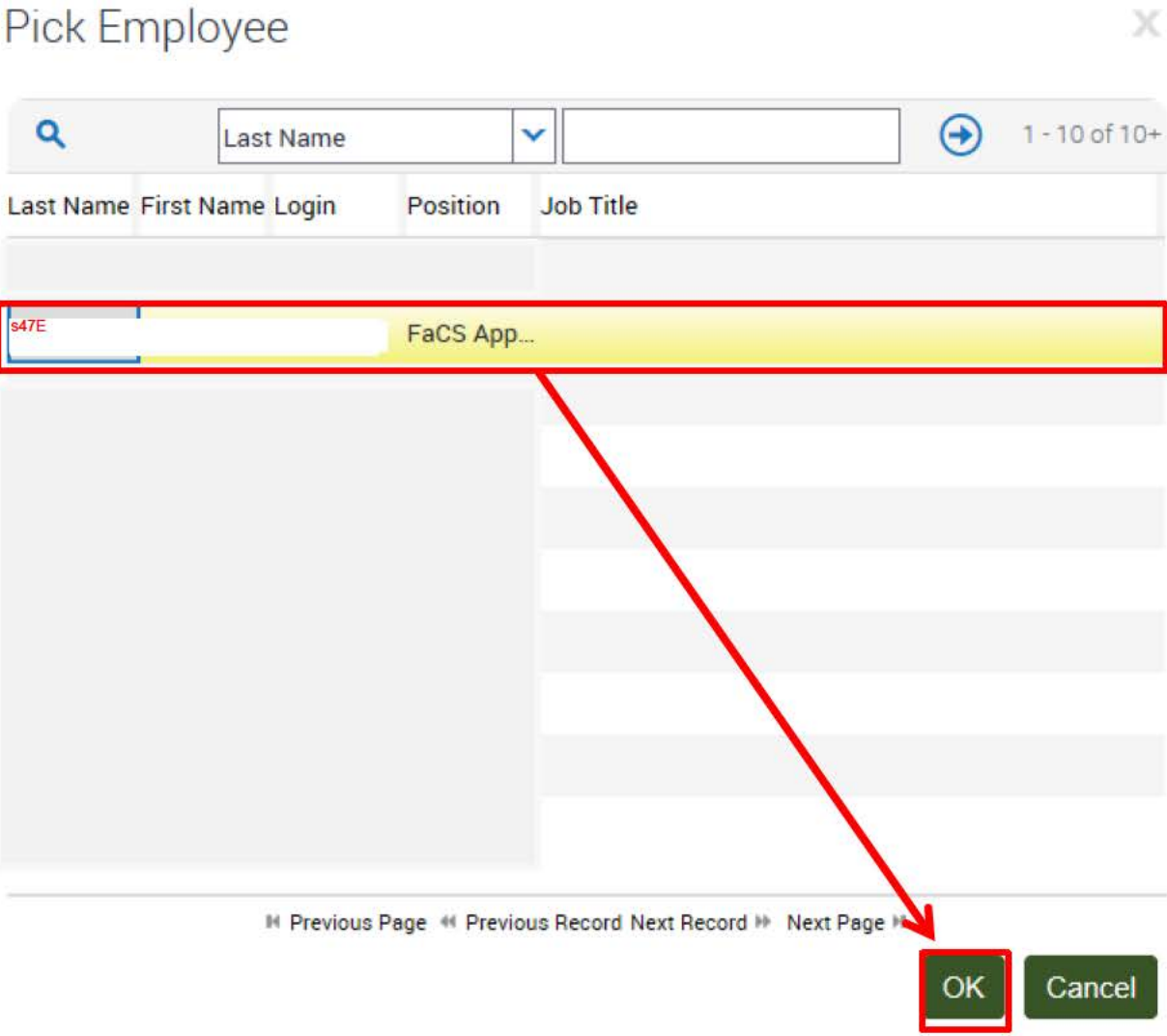
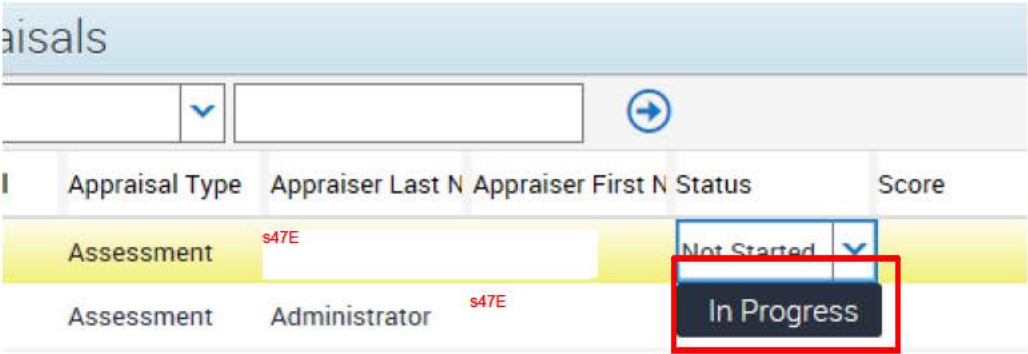
  


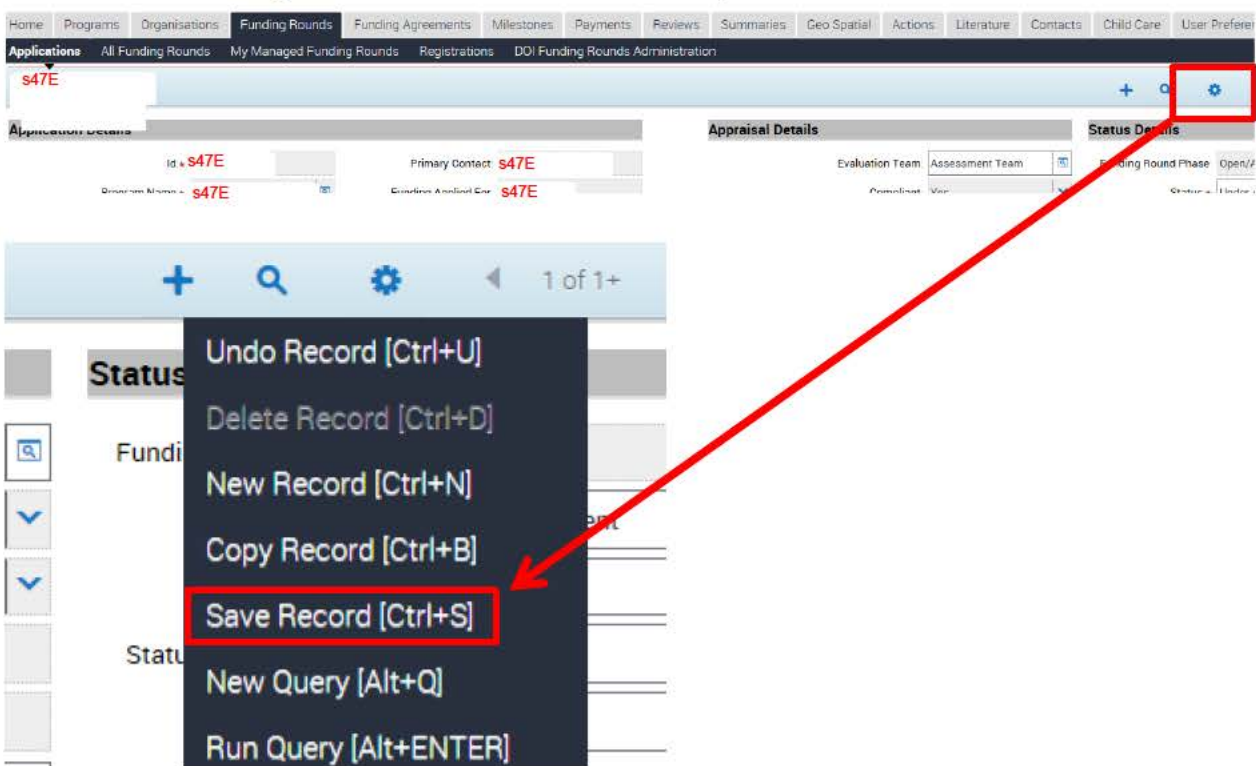
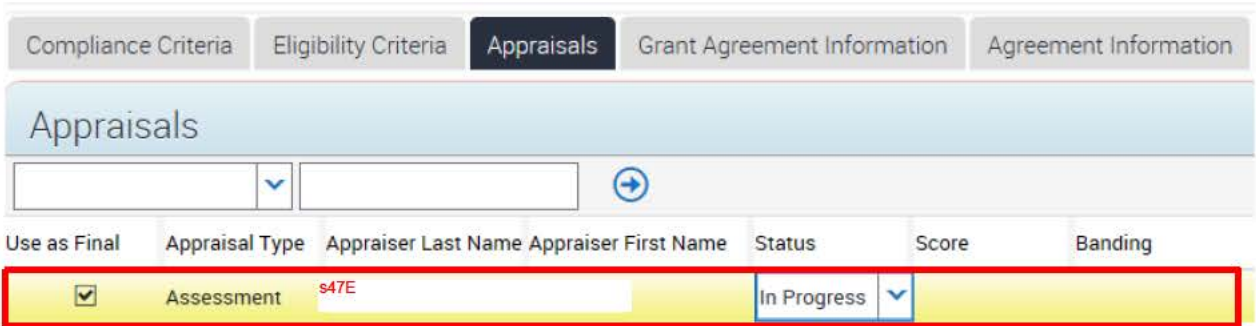
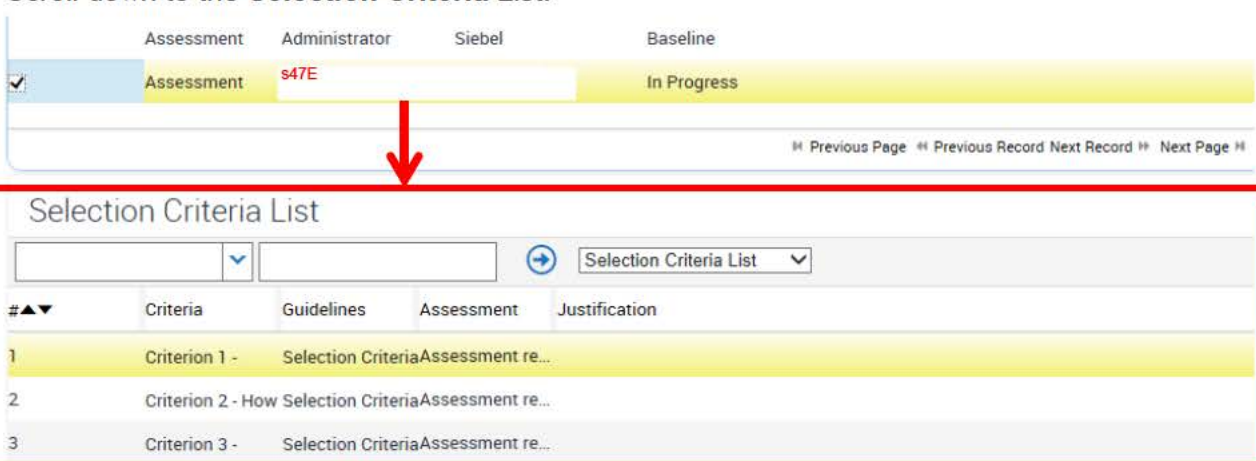
The screenshot shows the FOFMS application record page. The 'Appraisals' tab is highlighted with a red box and an arrow pointing to the 'Appraisals' tab in the navigation bar. Below the navigation bar, the 'Appraisals' section is highlighted with a red box, showing a table with the following data:

Use as Final	Appraisal Type	Appraiser Last N	Appraiser First N	Status	Score	Banding
<input type="checkbox"/>	Assessment	Administrator	s47E	Baseline		

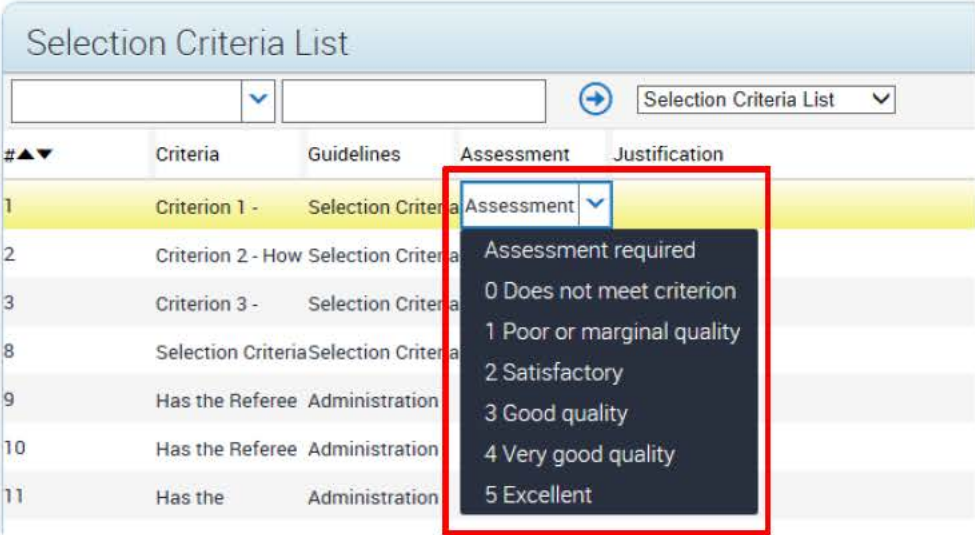
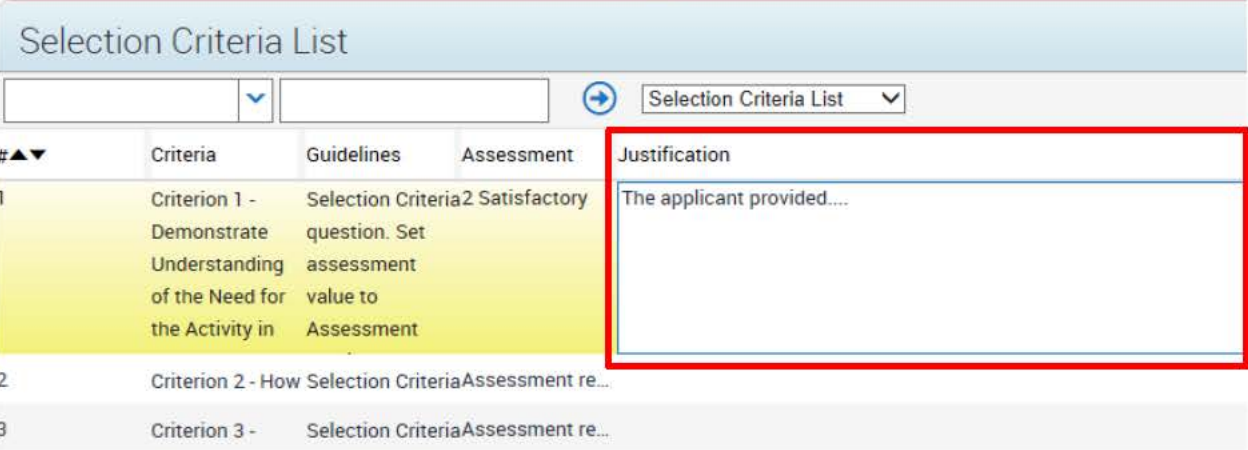
Steps	Actions
19	<p>Highlight the <b>Baseline Appraisal Record</b>.</p> 
20	<p>Click  and select <b>Copy Record</b>.</p> 
21	<p>A new assessment line will appear. Tick <b>Use as Final</b>.</p> 

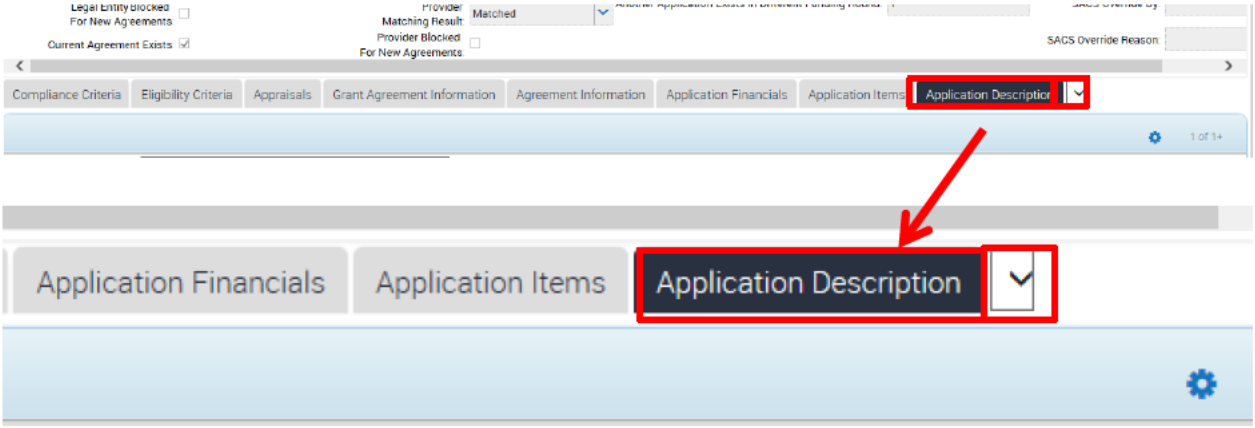
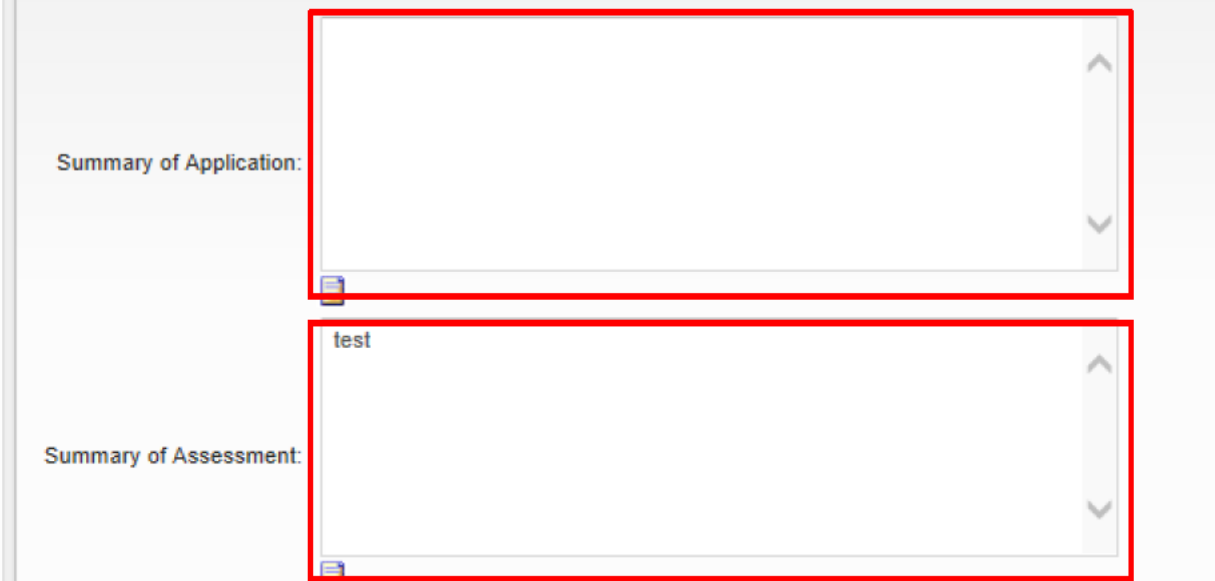
Steps	Actions
22	<p>From the Appraisal Type drop down menu select <b>Assessment</b>.</p>  <p>The screenshot shows a search bar at the top with the text 'Appraisals'. Below it is a navigation bar with a dropdown menu and a search button. The main content area is a table with columns: Appraisal Type, Appraiser Last Name, Appraiser First Name, Status, and Score. The 'Assessment' option is highlighted in the dropdown menu, and the 'Assessment' row in the table is highlighted in yellow.</p>
23	<p>In the <b>Appraiser Last Name</b> field, click the glyph </p>  <p>The screenshot shows the same interface as step 22. The 'Appraiser Last Name' field is highlighted in yellow, and a search glyph icon is visible in the bottom right corner of the field. The 'Assessment' row in the table is highlighted in yellow.</p>


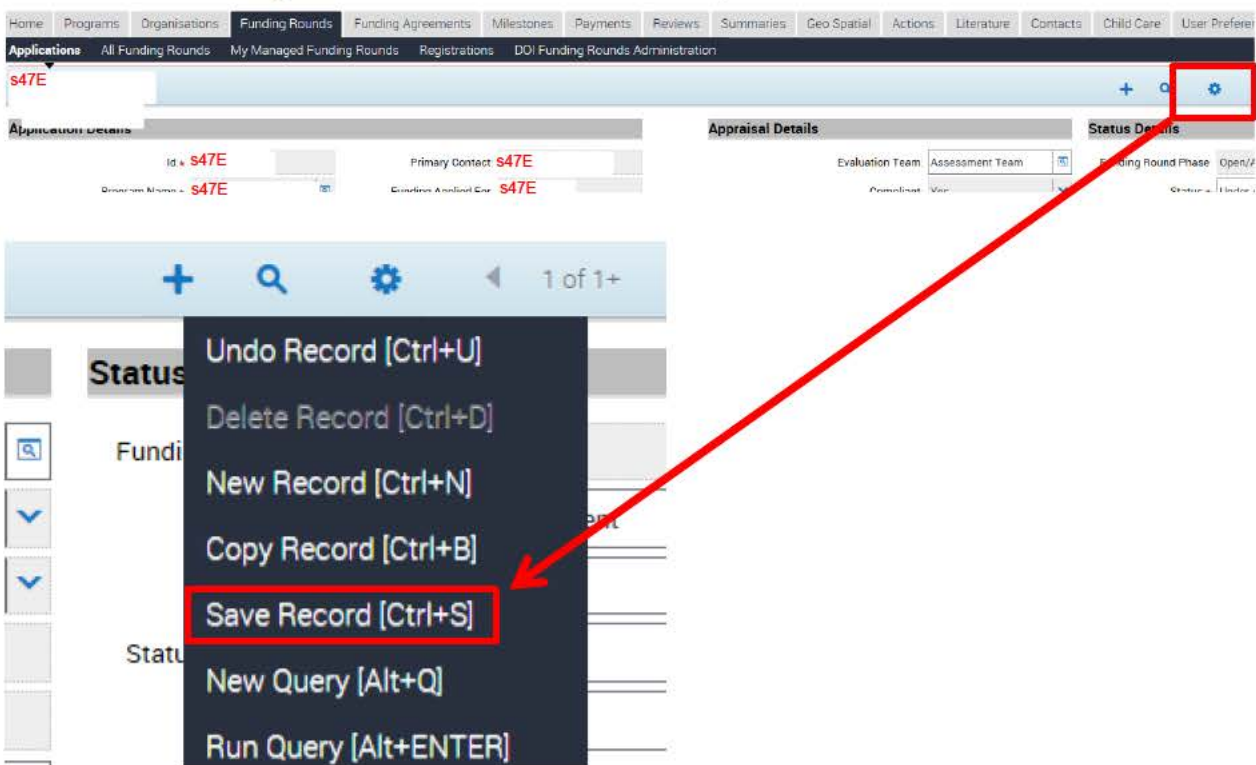
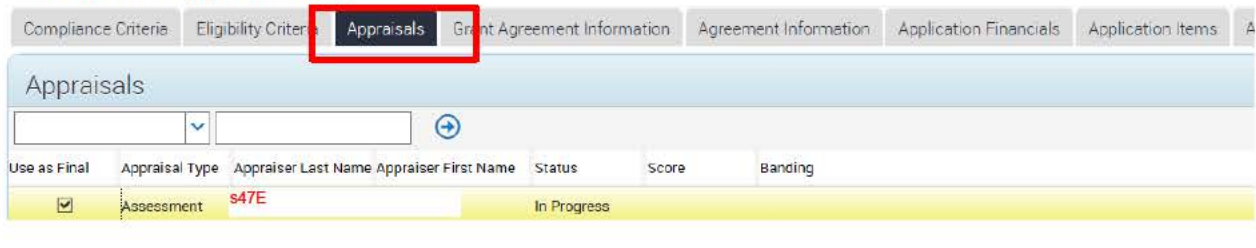
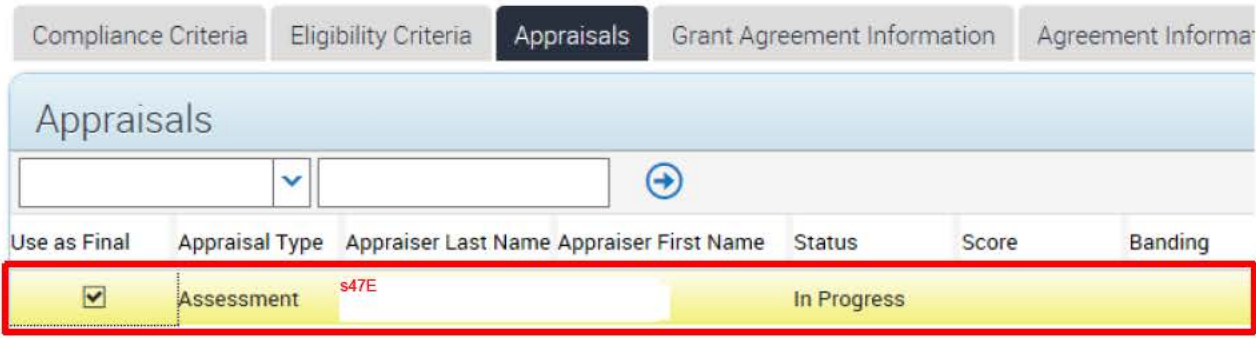
Steps	Actions																														
24	<p>A pop up box will open. Highlight your name. Click <b>OK</b>.</p>  <p>Pick Employee</p> <p>Last Name First Name Login Position Job Title</p> <table border="1"><tr><td>s47E</td><td></td><td></td><td></td><td>FaCS App...</td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr></table> <p>Previous Page Previous Record Next Record Next Page</p> <p>OK Cancel</p>	s47E				FaCS App...																									
s47E				FaCS App...																											
25	<p>Change the <b>Status</b> to <b>In Progress</b>.</p>  <p>Assessments</p> <table border="1"><thead><tr><th>Appraisal Type</th><th>Appraiser Last N</th><th>Appraiser First N</th><th>Status</th><th>Score</th></tr></thead><tbody><tr><td>Assessment</td><td>s47E</td><td></td><td>Not Started</td><td></td></tr><tr><td>Assessment</td><td>Administrator</td><td>s47E</td><td>In Progress</td><td></td></tr></tbody></table>	Appraisal Type	Appraiser Last N	Appraiser First N	Status	Score	Assessment	s47E		Not Started		Assessment	Administrator	s47E	In Progress																
Appraisal Type	Appraiser Last N	Appraiser First N	Status	Score																											
Assessment	s47E		Not Started																												
Assessment	Administrator	s47E	In Progress																												

Steps	Actions
<p>26</p>	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>  <p>The screenshot shows a web application interface with a navigation bar at the top containing various menu items like 'Home', 'Programs', 'Organisations', etc. Below the navigation bar, there are several tabs and a search bar. A dropdown menu is open, listing several actions: 'Undo Record [Ctrl+U]', 'Delete Record [Ctrl+D]', 'New Record [Ctrl+N]', 'Copy Record [Ctrl+B]', 'Save Record [Ctrl+S]', 'New Query [Alt+Q]', and 'Run Query [Alt+ENTER]'. The 'Save Record [Ctrl+S]' option is highlighted with a red box. A red arrow points from a gear icon in the top right corner of the application to the 'Save Record' option in the dropdown menu.</p>
<p>27</p>	<p>Highlight the appraisal record ticked as <b>Use as Final</b> and the status as <b>In Progress</b>.</p>  <p>The screenshot shows a table titled 'Appraisals' with several columns: 'Use as Final', 'Appraisal Type', 'Appraiser Last Name', 'Appraiser First Name', 'Status', 'Score', and 'Banding'. The first row is highlighted in yellow. In this row, the 'Use as Final' checkbox is checked, the 'Appraisal Type' is 'Assessment', the 'Appraiser Last Name' is 's47E', and the 'Status' is 'In Progress'.</p>
<p>28</p>	<p>Scroll down to the <b>Selection Criteria List</b>.</p>  <p>The screenshot shows a table titled 'Selection Criteria List' with columns: '#', 'Criteria', 'Guidelines', 'Assessment', and 'Justification'. The first row is highlighted in yellow. The 'Criteria' column contains 'Criterion 1 - Selection CriteriaAssessment re...'. A red arrow points from the 'In Progress' status in the previous screenshot to this section.</p>


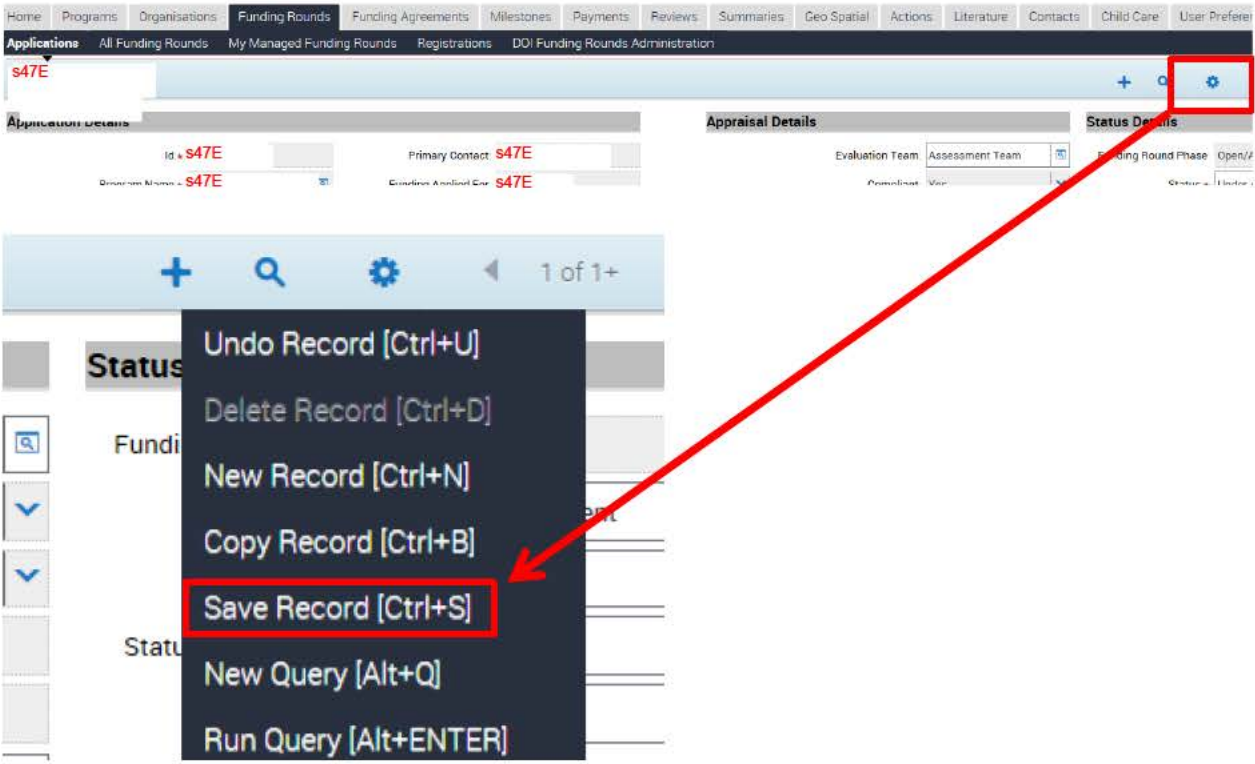


Steps	Actions
<p><b>29</b></p>	<p>For each criterion enter the score from the Assessment Tool by selecting the <b>Assessment</b> drop down menu.</p> <ul style="list-style-type: none"> <li>• 1 = Poor or Limited</li> <li>• 2 = Satisfactory</li> <li>• 3 = Good</li> <li>• 4 = Very Good</li> <li>• 5 = Excellent</li> </ul> 
<p><b>30</b></p>	<p>For each criterion copy the text from the Assessment Tool into the corresponding <b>Justification</b> field.</p> <p><i>Note: Each field has a 4000 character limit including spaces.</i></p> 


Steps	Actions
<p>31</p>	<p>Select the <b>Application Description</b> tab.</p> <p><i>Note: If you cannot view the Application Description, select Application Description from the drop down list.</i></p> 
<p>32</p>	<p>Copy the text from Summary of Application in the Assessment Tool into the <b>Summary of Application</b> field.</p> <p>Copy the text from Summary of Assessment in the Assessment Tool into the <b>Summary of Assessment</b> field.</p> <p><i>Note: Each field has a 2000 character limit including spaces.</i></p>  <p><b>NOTE:</b> The <b>Summary of Assessment</b> field may already be pre-populated with the <b>Summary of Application</b> information. If so, adjust accordingly (copy the correct text from the Assessment Tool into the correct fields).</p>

Steps	Actions
<p>33</p>	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>  <p>The screenshot shows a web application interface with a top navigation bar containing tabs like 'Home', 'Programs', 'Organisations', 'Funding Rounds', etc. Below this is a sub-navigation bar with 'Applications', 'All Funding Rounds', 'My Managed Funding Rounds', 'Registrations', and 'DOI Funding Rounds Administration'. The main content area displays 'Application Details' and 'Appraisal Details' for a record with ID 's47E'. A settings menu is open, listing options: 'Undo Record [Ctrl+U]', 'Delete Record [Ctrl+D]', 'New Record [Ctrl+N]', 'Copy Record [Ctrl+B]', 'Save Record [Ctrl+S]', 'New Query [Alt+Q]', and 'Run Query [Alt+ENTER]'. The 'Save Record [Ctrl+S]' option is highlighted with a red box, and a red arrow points from the gear icon in the top right of the interface to this option.</p>
<p>34</p>	<p>Click on the <b>Appraisals</b> tab.</p>  <p>The screenshot shows the 'Appraisals' tab selected in the top navigation bar. Below the navigation bar, there is a search bar and a table with columns: 'Use as Final', 'Appraisal Type', 'Appraiser Last Name', 'Appraiser First Name', 'Status', 'Score', and 'Banding'. A single record is visible: 'Assessment' with ID 's47E' and status 'In Progress'. The 'Appraisals' tab in the navigation bar is highlighted with a red box.</p>
<p>35</p>	<p>Highlight the appraisal record ticked as <b>Use as Final</b> with the status <b>In Progress</b>.</p>  <p>The screenshot shows the 'Appraisals' tab selected. The table from the previous step is shown, but now the entire row for the 'Assessment' record (ID 's47E', status 'In Progress') is highlighted with a red box, indicating it is the record to be focused on.</p>

Steps	Actions														
36	<p>Change the status from <b>In Progress</b> to <b>Completed</b>.</p> <p>Compliance Criteria Eligibility Criteria <b>Appraisals</b> Grant Agreement Information Agreement Information</p> <p>Appraisals</p> <p>Appraisal Type Appraiser Last Name Appraiser First Name Status Score Banding</p> <table border="1"> <thead> <tr> <th>Use as Final</th> <th>Appraisal Type</th> <th>Appraiser Last Name</th> <th>Appraiser First Name</th> <th>Status</th> <th>Score</th> <th>Banding</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Assessment</td> <td>s47E</td> <td></td> <td>In Progress</td> <td></td> <td></td> </tr> </tbody> </table> <p><b>In Progress</b> dropdown menu options: <b>Completed</b>, Withdrawn, Baseline</p>	Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	Score	Banding	<input checked="" type="checkbox"/>	Assessment	s47E		In Progress		
Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	Score	Banding									
<input checked="" type="checkbox"/>	Assessment	s47E		In Progress											
37	<p>A <b>Score</b> and <b>Banding</b> will populate based on your assessment.</p> <p>Type Appraiser Last Name Appraiser First Name Status Score Banding</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Appraiser Last Name</th> <th>Appraiser First Name</th> <th>Status</th> <th>Score</th> <th>Banding</th> </tr> </thead> <tbody> <tr> <td></td> <td>s47E</td> <td></td> <td>Completed</td> <td>6</td> <td>1</td> </tr> </tbody> </table>	Type	Appraiser Last Name	Appraiser First Name	Status	Score	Banding		s47E		Completed	6	1		
Type	Appraiser Last Name	Appraiser First Name	Status	Score	Banding										
	s47E		Completed	6	1										
38	<p>Change the <b>Application Sub Status</b> to <b>Complete</b>.</p> <p>Home Programs Organisations <b>Funding Rounds</b> Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions Literature Contacts Child Care</p> <p>Applications All Funding Rounds My Managed Funding Rounds Registrations DOI Funding Rounds Administration</p> <p>s47E</p> <p>Details</p> <table border="1"> <thead> <tr> <th>Details</th> <th>Appraisal Details</th> <th>Status Details</th> </tr> </thead> <tbody> <tr> <td>                     Id: s47E                      Program Name: s47E                      Funding Round Name: s47E                      Registration Id: s47E                      Financial Year: 2016-2017                      Submission Date: 24/01/2017 01:23:31 PM                      Received Date: 24/01/2017                      Funding Round Type: s47E                      Submission Reference: s47E                 </td> <td>                     Evaluation Team: Assessment Team                      Compliant: Yes                      Eligible: Yes                      Score: 6                      Banding: 1                      Ranking: QP                      QA Review: <input checked="" type="checkbox"/> </td> <td>                     Funding Round Phase: Open/Appraise                      Status: Under Assessment                      Sub Status: <b>Complete</b>                      Status Change Date: 16/02/2017                      Shortlisted: <input type="checkbox"/>                      Check Application: <input checked="" type="checkbox"/>                      Funding Round Defaults Checked: <input type="checkbox"/>                      Minute Generated: <input type="checkbox"/>                      Minute/Ref Number:                 </td> </tr> </tbody> </table>	Details	Appraisal Details	Status Details	Id: s47E Program Name: s47E Funding Round Name: s47E Registration Id: s47E Financial Year: 2016-2017 Submission Date: 24/01/2017 01:23:31 PM Received Date: 24/01/2017 Funding Round Type: s47E Submission Reference: s47E	Evaluation Team: Assessment Team Compliant: Yes Eligible: Yes Score: 6 Banding: 1 Ranking: QP QA Review: <input checked="" type="checkbox"/>	Funding Round Phase: Open/Appraise Status: Under Assessment Sub Status: <b>Complete</b> Status Change Date: 16/02/2017 Shortlisted: <input type="checkbox"/> Check Application: <input checked="" type="checkbox"/> Funding Round Defaults Checked: <input type="checkbox"/> Minute Generated: <input type="checkbox"/> Minute/Ref Number:								
Details	Appraisal Details	Status Details													
Id: s47E Program Name: s47E Funding Round Name: s47E Registration Id: s47E Financial Year: 2016-2017 Submission Date: 24/01/2017 01:23:31 PM Received Date: 24/01/2017 Funding Round Type: s47E Submission Reference: s47E	Evaluation Team: Assessment Team Compliant: Yes Eligible: Yes Score: 6 Banding: 1 Ranking: QP QA Review: <input checked="" type="checkbox"/>	Funding Round Phase: Open/Appraise Status: Under Assessment Sub Status: <b>Complete</b> Status Change Date: 16/02/2017 Shortlisted: <input type="checkbox"/> Check Application: <input checked="" type="checkbox"/> Funding Round Defaults Checked: <input type="checkbox"/> Minute Generated: <input type="checkbox"/> Minute/Ref Number:													

Steps	Actions
39	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>  <p>The screenshot shows a web application interface with a navigation bar at the top containing various menu items like Home, Programs, Organisations, Funding Rounds, etc. Below the navigation bar, there are several tabs and a search bar. A dropdown menu is open, displaying several options: Undo Record [Ctrl+U], Delete Record [Ctrl+D], New Record [Ctrl+N], Copy Record [Ctrl+B], Save Record [Ctrl+S], New Query [Alt+Q], and Run Query [Alt+ENTER]. The 'Save Record [Ctrl+S]' option is highlighted with a red box. A red arrow points from the gear icon in the top right corner of the application to the 'Save Record' option in the dropdown menu.</p>

## Logging Out of FOFMS

Steps	Actions
40	To log out of FOFMS select <b>File</b> then <b>Log Out</b> or use shortcut <b>Ctrl+Shift+X</b> .  A screenshot of the Oracle FOFMS application's menu bar. The 'File' menu is open, showing options like 'Create Bookmark...', 'Log Out [Ctrl+Shift+X]', and others. The 'Log Out [Ctrl+Shift+X]' option is highlighted with a red rectangular box. The menu bar includes 'ORACLE', 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', 'Help', and 'Search'. Below the menu bar, there are icons for user profiles and a 'Home' button.

## Need Help?

For further assistance please speak to your Team Leader.



# FOFMS TASKCARD

## Re-assessing Applications - Partial Re-assessment

This task card will take an Assessor through the process of completing a partial re-assessment of an application in FOFMS.

Contents	Page
Open the Application Record .....	2
Update the Assessment in FOFMS .....	11
Update the Summary of Application and Assessment.....	18
Complete the Partial Re-Assessment in FOFMS.....	19
Log out of FOFMS.....	20
Need Help? .....	20

### Before you begin ensure you have:

- The Application Id of the Application that requires re-assessing.
- The required changes to the assessment.

### FOFMS Access Required:

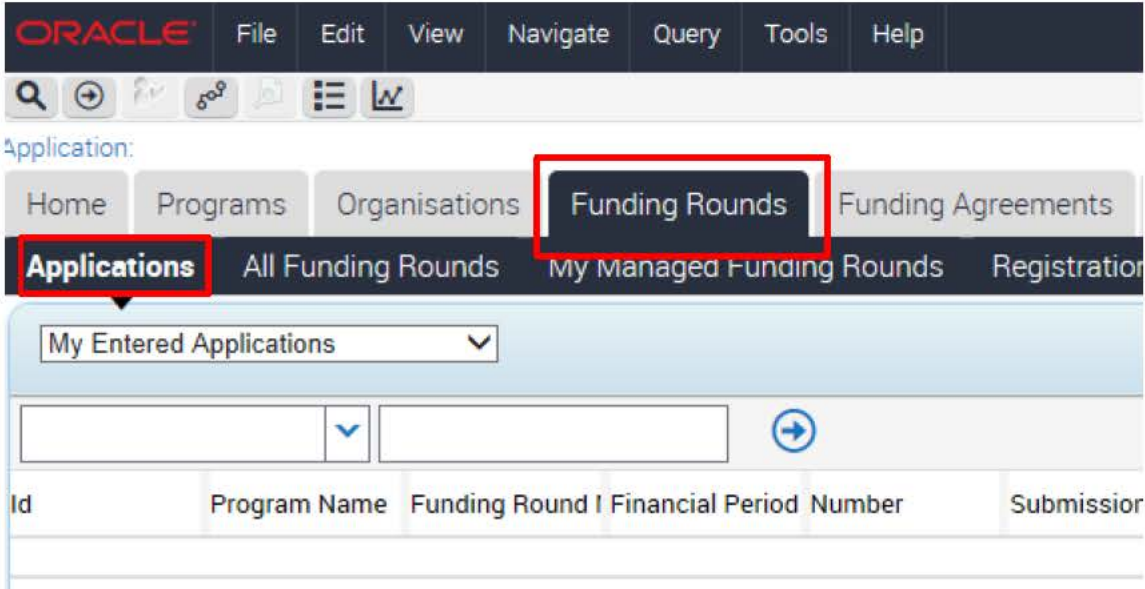
- FOFMS Application Appraiser

**\*If at any step you feel you have made an incorrect selection, press 'Esc' and attempt the step again. If this fails to resolve the issue, speak to your Team Leader.**

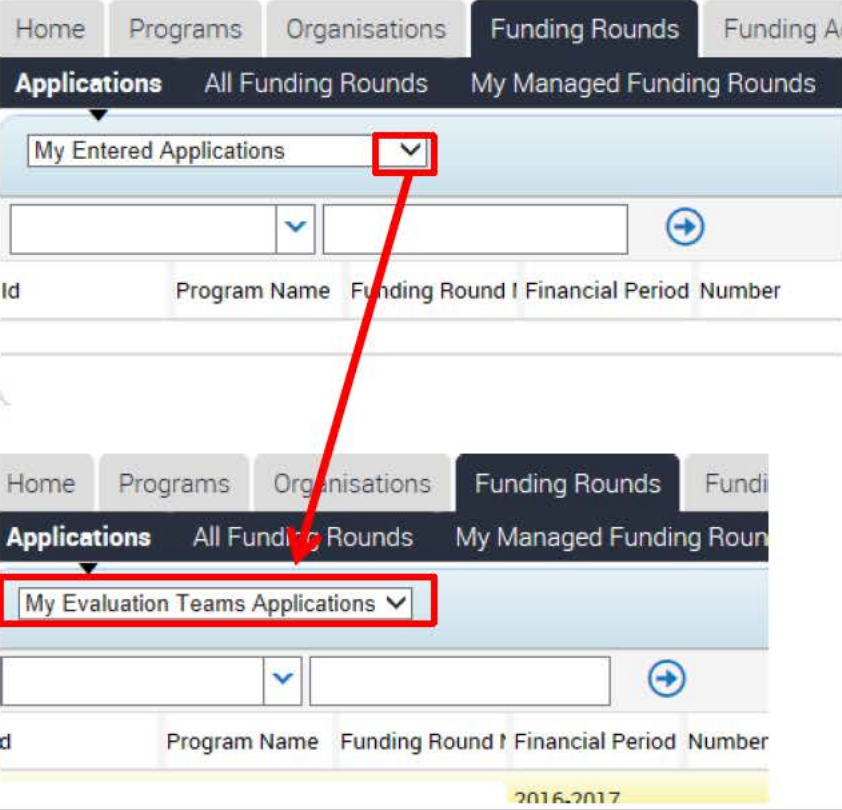
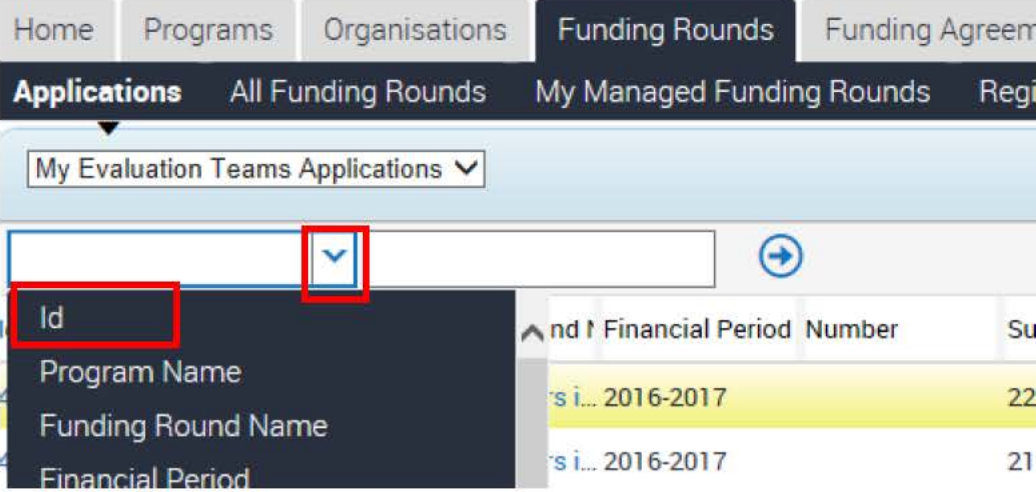
### Update Instructions For Each Funding Round


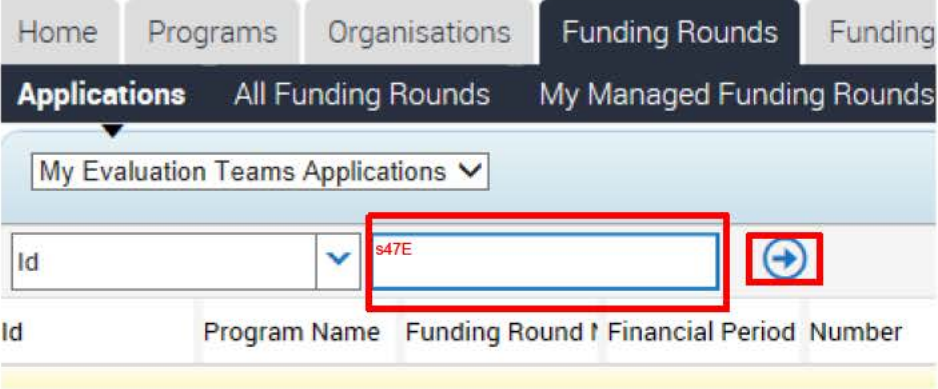
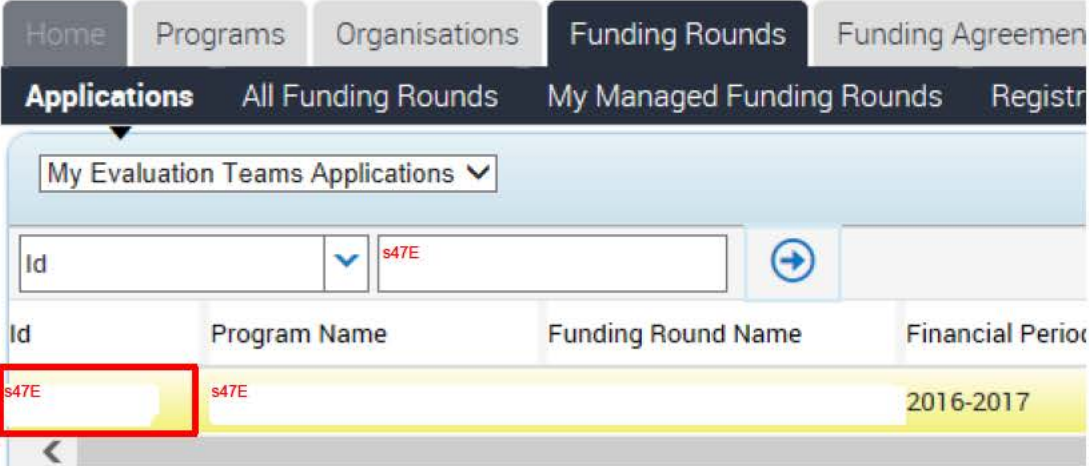
- Update Step 15 with the appropriate ARC Folder Record Number
- Add or change steps as required to reflect funding round specific processes

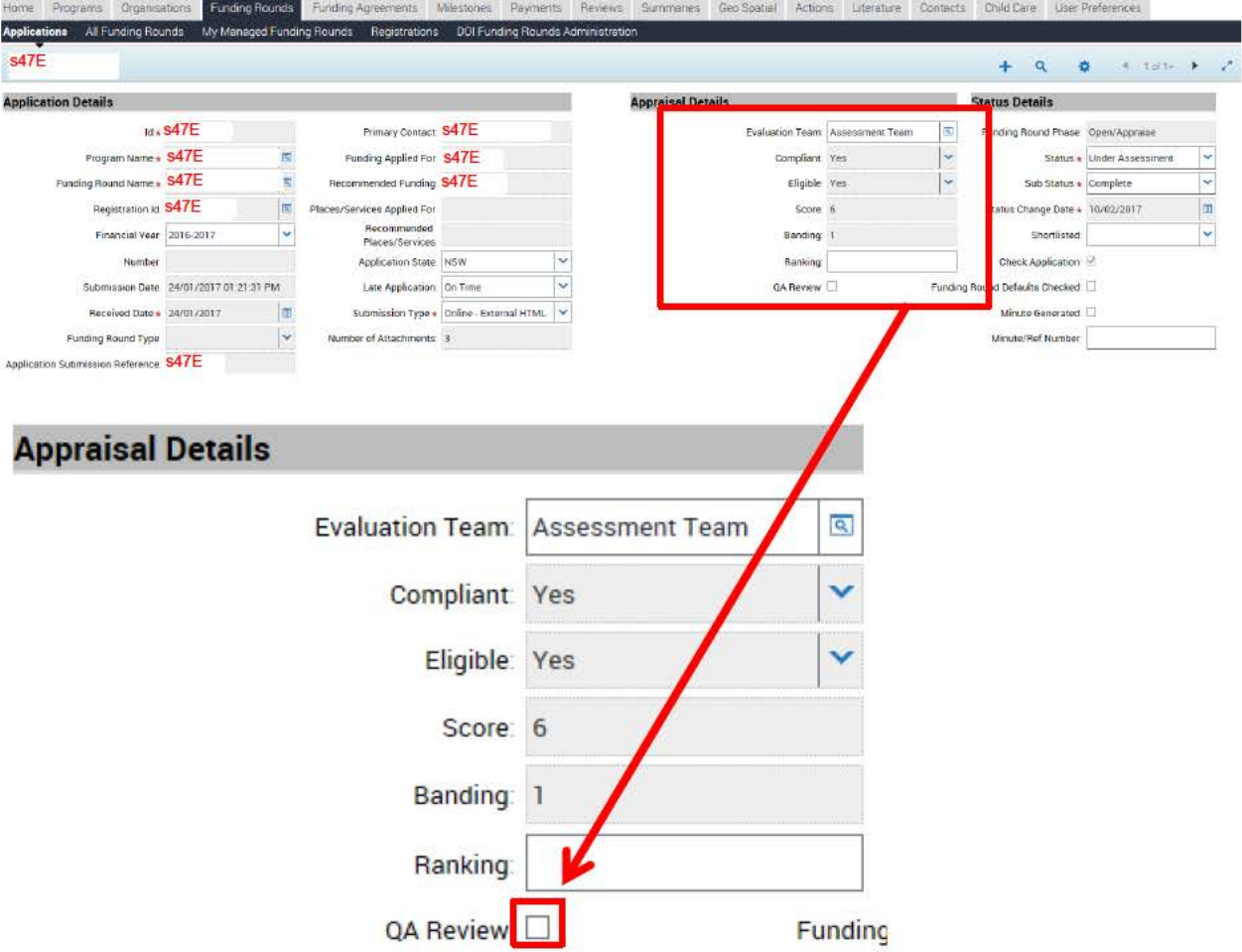
## Open the Application Record

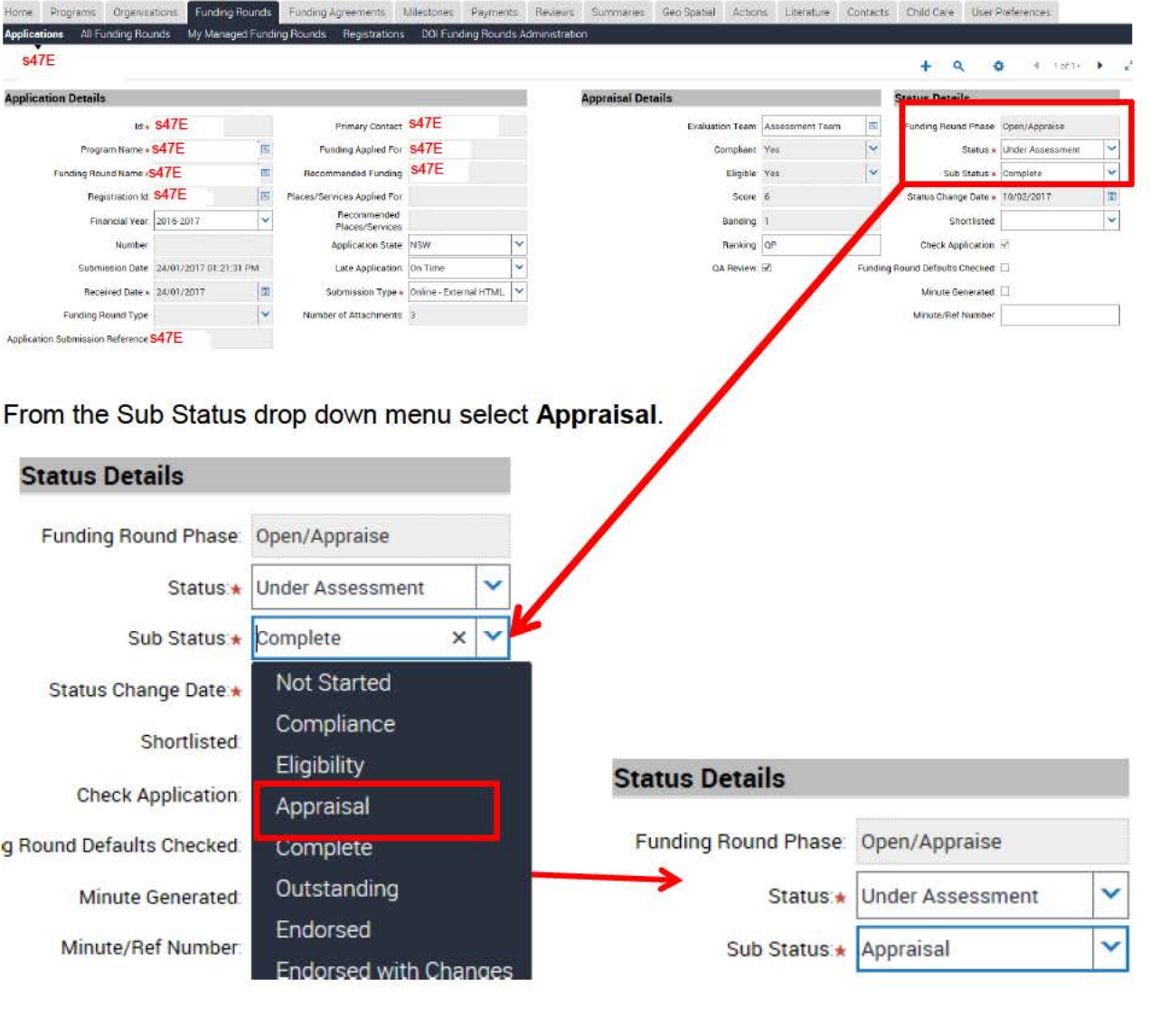
Steps	Actions
1	Open FOFMS to access the Application Record
2	<p>Click on the <b>Funding Rounds</b> tab. Click on the <b>Applications</b> link.</p>  <p>The screenshot shows the Oracle FOFMS interface. At the top is the Oracle logo and a menu with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below the menu is a search bar and a toolbar with icons for search, home, refresh, undo, redo, and print. The main navigation area has tabs for 'Home', 'Programs', 'Organisations', 'Funding Rounds', and 'Funding Agreements'. The 'Funding Rounds' tab is highlighted with a red box. Below this is a sub-menu with 'Applications', 'All Funding Rounds', 'My Managed Funding Rounds', and 'Registration'. The 'Applications' link is also highlighted with a red box. Below the navigation is a dropdown menu for 'My Entered Applications'. At the bottom, there is a table with columns: 'Id', 'Program Name', 'Funding Round I', 'Financial Period', 'Number', and 'Submission'.</p>

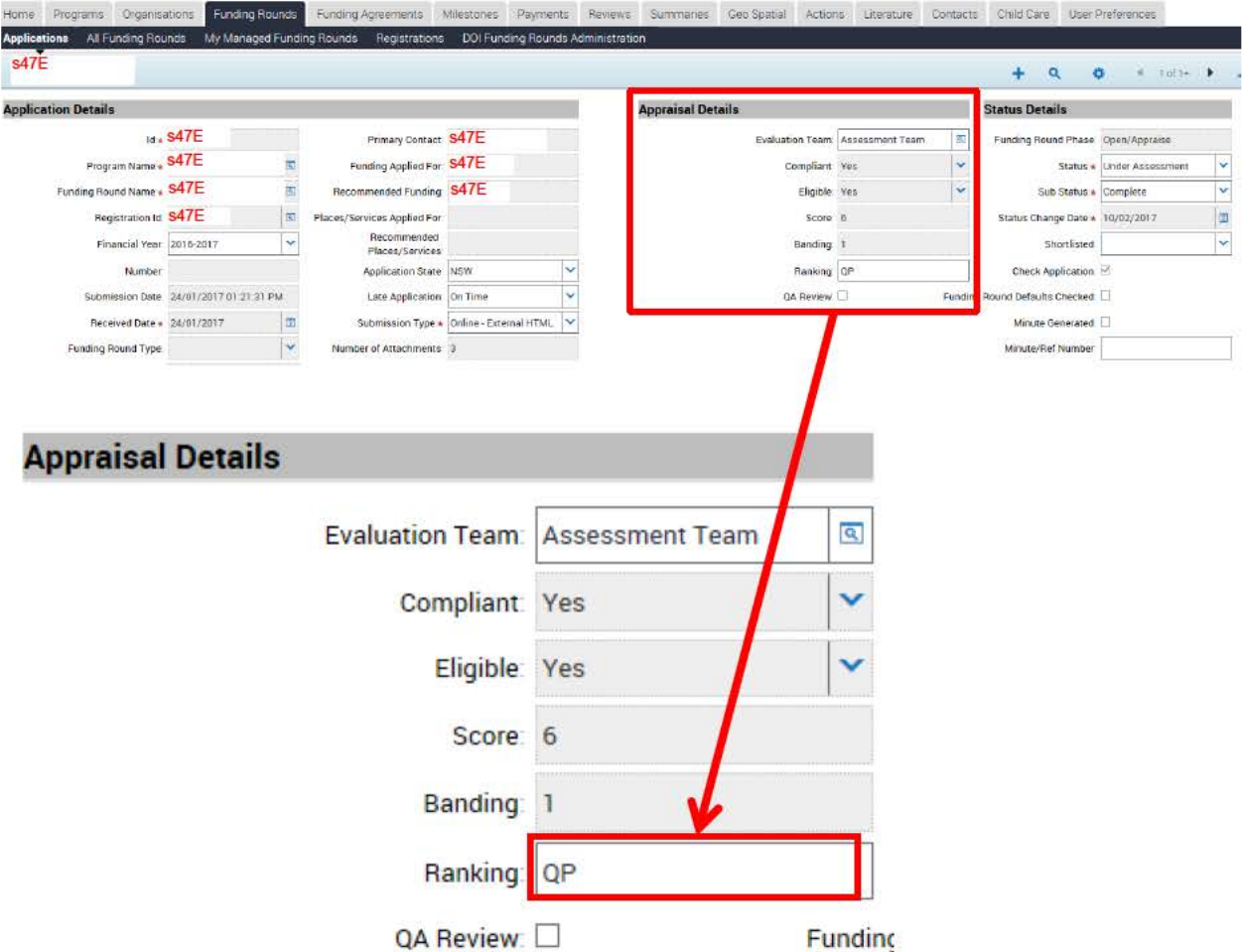


Steps	Actions
<p>3</p>	<p>Click on the drop down menu            Select <b>My Evaluation Team's Applications</b>.</p>  <p>The screenshot shows a navigation menu with 'Home', 'Programs', 'Organisations', 'Funding Rounds', and 'Funding A'. Below this is a sub-menu with 'Applications', 'All Funding Rounds', and 'My Managed Funding Rounds'. A dropdown menu is open, showing 'My Entered Applications' with a red box around the dropdown arrow. A red arrow points to the second screenshot, which shows the dropdown menu with 'My Evaluation Teams Applications' selected and highlighted with a red box. Below the dropdown is a search bar and a table with columns: 'Id', 'Program Name', 'Funding Round', 'Financial Period', and 'Number'. A row with '2016-2017' is highlighted in yellow.</p>
<p>4</p>	<p>Click on the drop down menu.            Select <b>Id</b>.</p>  <p>The screenshot shows the same navigation menu as above. The dropdown menu is open, showing 'My Evaluation Teams Applications' with a red box around the dropdown arrow. Below this is a search bar and a table with columns: 'Id', 'Program Name', 'Funding Round', 'Financial Period', and 'Number'. A dropdown menu is open over the search bar, with 'Id' selected and highlighted with a red box. Other options in the dropdown include 'Program Name', 'Funding Round Name', and 'Financial Period'. The table below shows a row with '2016-2017' highlighted in yellow.</p>


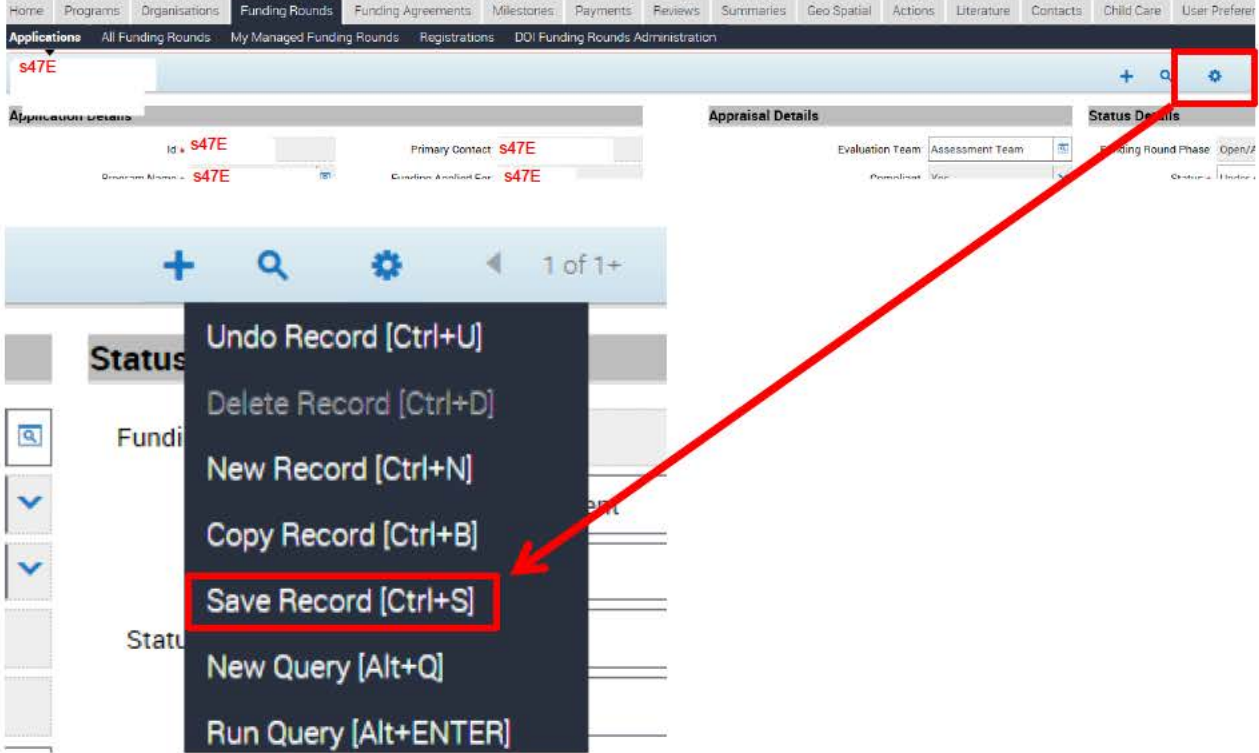
Steps	Actions
5	<p>Enter the <b>Application Id</b> in the next field. Click .</p>  <p>The screenshot shows a navigation menu with 'Applications' selected. Below it is a dropdown menu for 'My Evaluation Teams Applications'. The 'Id' field contains 's47E' and a search button (arrow icon) is highlighted with a red box.</p>
6	<p>The application record will open.          Click on the <b>hyperlink</b> in the <b>Id</b> column.</p>  <p>The screenshot shows the application record for 's47E' highlighted with a red box. The record is displayed in a table with columns: Id, Program Name, Funding Round Name, and Financial Period. The 'Id' column contains 's47E', 'Program Name' contains 's47E', and 'Financial Period' contains '2016-2017'.</p>

Steps	Actions																																																																																							
7	<p>The Application Record will open. Check that the QA review box is <b>un-ticked</b>.</p>  <p>The screenshot shows the application record for ID s47E. The 'Appraisal Details' section is highlighted with a red box. The 'QA Review' checkbox is currently unchecked, and a red arrow points to it. The 'Funding' label is visible below the 'QA Review' checkbox.</p> <table border="1"><thead><tr><th colspan="2">Application Details</th><th colspan="2">Appraisal Details</th><th colspan="2">Status Details</th></tr></thead><tbody><tr><td>Id: s47E</td><td>Primary Contact: s47E</td><td>Evaluation Team: Assessment Team</td><td>Funding Round Phase: Open/Appraise</td><td>Status: Under Assessment</td><td></td></tr><tr><td>Program Name: s47E</td><td>Funding Applied For: s47E</td><td>Compliant: Yes</td><td>Sub Status: Complete</td><td>Status Change Date: 10/02/2017</td><td>Shortlisted: </td></tr><tr><td>Funding Round Name: s47E</td><td>Recommended Funding: s47E</td><td>Eligible: Yes</td><td>Score: 6</td><td>Check Application: <input checked="" type="checkbox"/></td><td>Minute Generated: <input type="checkbox"/></td></tr><tr><td>Registration Id: s47E</td><td>Places/Services Applied For: </td><td>Score: 6</td><td>Banding: 1</td><td>Funding Round Defaults Checked: <input type="checkbox"/></td><td>Minute/Ref Number: </td></tr><tr><td>Financial Year: 2016-2017</td><td>Recommended Places/Services: </td><td>Banding: 1</td><td>Ranking: </td><td></td><td></td></tr><tr><td>Number: </td><td>Application State: NSW</td><td>Ranking: </td><td>QA Review: <input type="checkbox"/></td><td></td><td></td></tr><tr><td>Submission Date: 24/01/2017 01:21:31 PM</td><td>Late Application: On Time</td><td></td><td></td><td></td><td></td></tr><tr><td>Received Date: 29/01/2017</td><td>Submission Type: Online - External HTML</td><td></td><td></td><td></td><td></td></tr><tr><td>Funding Round Type: </td><td>Number of Attachments: 3</td><td></td><td></td><td></td><td></td></tr><tr><td>Application Submission Reference: s47E</td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table> <h3>Appraisal Details</h3> <table><tr><td>Evaluation Team:</td><td>Assessment Team</td><td><input type="button" value="Search"/></td></tr><tr><td>Compliant:</td><td>Yes</td><td><input type="button" value="Down Arrow"/></td></tr><tr><td>Eligible:</td><td>Yes</td><td><input type="button" value="Down Arrow"/></td></tr><tr><td>Score:</td><td>6</td><td></td></tr><tr><td>Banding:</td><td>1</td><td></td></tr><tr><td>Ranking:</td><td></td><td></td></tr><tr><td>QA Review:</td><td><input type="checkbox"/></td><td>Funding</td></tr></table>	Application Details		Appraisal Details		Status Details		Id: s47E	Primary Contact: s47E	Evaluation Team: Assessment Team	Funding Round Phase: Open/Appraise	Status: Under Assessment		Program Name: s47E	Funding Applied For: s47E	Compliant: Yes	Sub Status: Complete	Status Change Date: 10/02/2017	Shortlisted:	Funding Round Name: s47E	Recommended Funding: s47E	Eligible: Yes	Score: 6	Check Application: <input checked="" type="checkbox"/>	Minute Generated: <input type="checkbox"/>	Registration Id: s47E	Places/Services Applied For:	Score: 6	Banding: 1	Funding Round Defaults Checked: <input type="checkbox"/>	Minute/Ref Number:	Financial Year: 2016-2017	Recommended Places/Services:	Banding: 1	Ranking:			Number:	Application State: NSW	Ranking:	QA Review: <input type="checkbox"/>			Submission Date: 24/01/2017 01:21:31 PM	Late Application: On Time					Received Date: 29/01/2017	Submission Type: Online - External HTML					Funding Round Type:	Number of Attachments: 3					Application Submission Reference: s47E						Evaluation Team:	Assessment Team	<input type="button" value="Search"/>	Compliant:	Yes	<input type="button" value="Down Arrow"/>	Eligible:	Yes	<input type="button" value="Down Arrow"/>	Score:	6		Banding:	1		Ranking:			QA Review:	<input type="checkbox"/>	Funding
Application Details		Appraisal Details		Status Details																																																																																				
Id: s47E	Primary Contact: s47E	Evaluation Team: Assessment Team	Funding Round Phase: Open/Appraise	Status: Under Assessment																																																																																				
Program Name: s47E	Funding Applied For: s47E	Compliant: Yes	Sub Status: Complete	Status Change Date: 10/02/2017	Shortlisted:																																																																																			
Funding Round Name: s47E	Recommended Funding: s47E	Eligible: Yes	Score: 6	Check Application: <input checked="" type="checkbox"/>	Minute Generated: <input type="checkbox"/>																																																																																			
Registration Id: s47E	Places/Services Applied For:	Score: 6	Banding: 1	Funding Round Defaults Checked: <input type="checkbox"/>	Minute/Ref Number:																																																																																			
Financial Year: 2016-2017	Recommended Places/Services:	Banding: 1	Ranking:																																																																																					
Number:	Application State: NSW	Ranking:	QA Review: <input type="checkbox"/>																																																																																					
Submission Date: 24/01/2017 01:21:31 PM	Late Application: On Time																																																																																							
Received Date: 29/01/2017	Submission Type: Online - External HTML																																																																																							
Funding Round Type:	Number of Attachments: 3																																																																																							
Application Submission Reference: s47E																																																																																								
Evaluation Team:	Assessment Team	<input type="button" value="Search"/>																																																																																						
Compliant:	Yes	<input type="button" value="Down Arrow"/>																																																																																						
Eligible:	Yes	<input type="button" value="Down Arrow"/>																																																																																						
Score:	6																																																																																							
Banding:	1																																																																																							
Ranking:																																																																																								
QA Review:	<input type="checkbox"/>	Funding																																																																																						

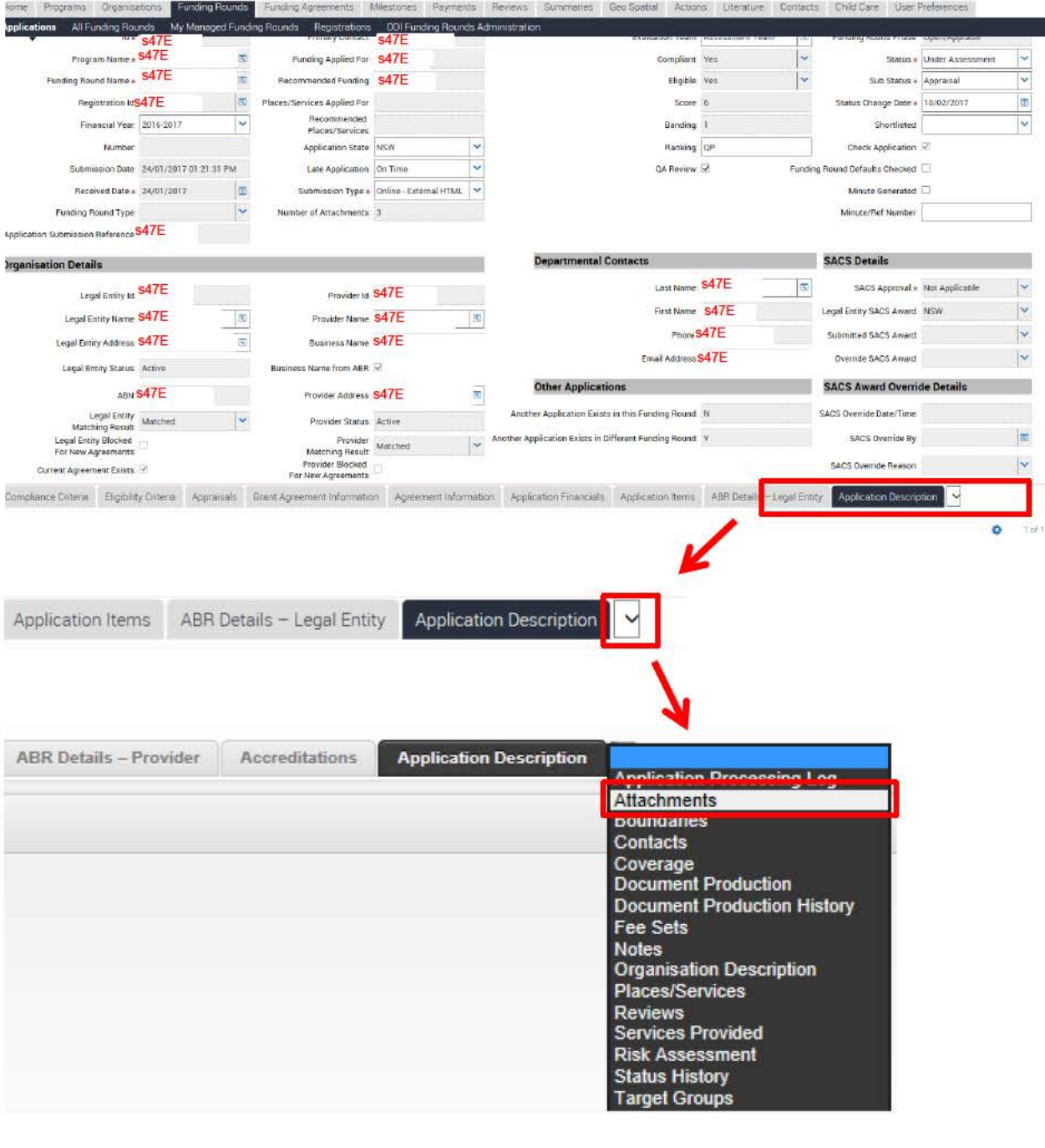
Steps	Actions
8	<p><b>Change the Sub Status to Appraisal.</b></p>  <p>From the Sub Status drop down menu select <b>Appraisal</b>.</p> <p><b>Status Details</b></p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: Under Assessment</p> <p>Sub Status: Complete</p> <p>Status Change Date: 19/02/2017</p> <p>Shortlisted</p> <p>Check Application: <input type="checkbox"/></p> <p>Funding Round Defaults Checked: <input type="checkbox"/></p> <p>Minute Generated: <input type="checkbox"/></p> <p>Minute/Ref Number: <input type="text"/></p> <p><b>Status Details</b></p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: Under Assessment</p> <p>Sub Status: Appraisal</p>

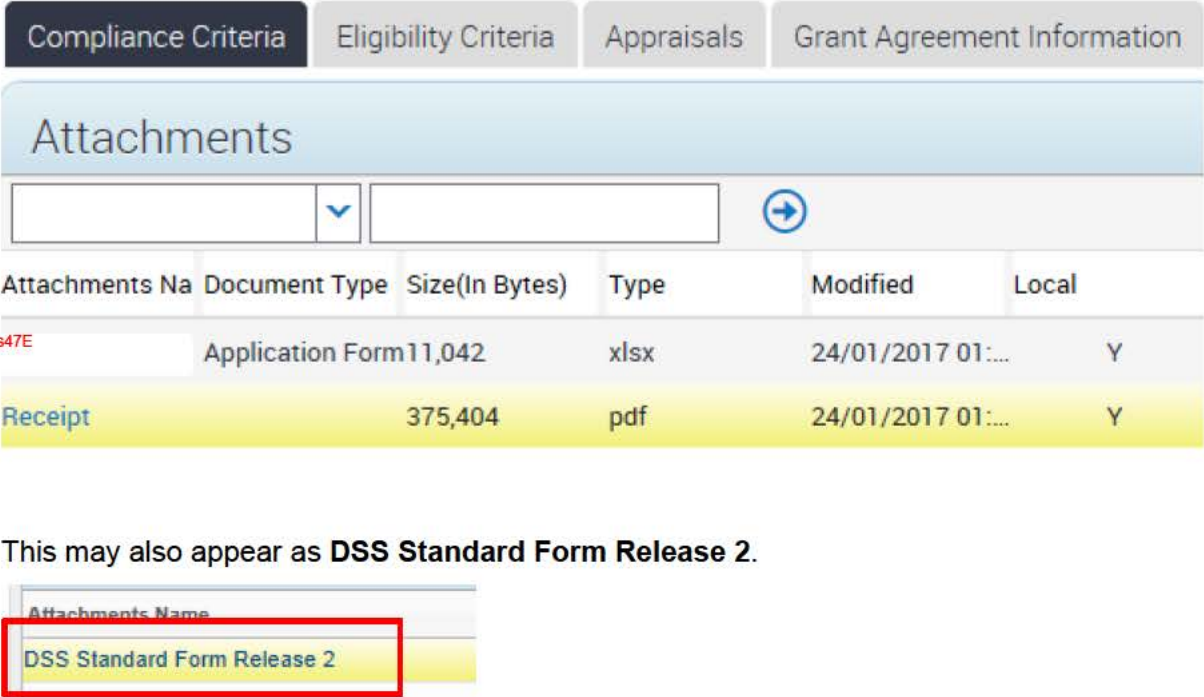
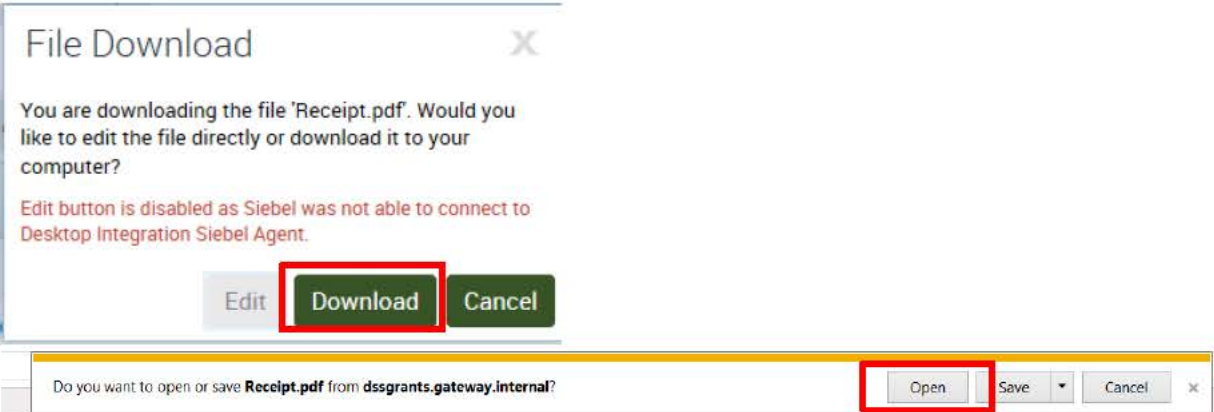
Steps	Actions						
9	<p>Enter the type of re-assessment being undertaken in the Ranking field.</p> <table border="1" data-bbox="225 360 954 539"> <tr> <td>Re-Assessment Type Requested from</td> <td>Enter into Ranking field</td> </tr> <tr> <td>QA Reviewer</td> <td>QP</td> </tr> <tr> <td>Moderator</td> <td>MP</td> </tr> </table> <p>If it is a Partial Re-assessment requested by the QA Reviewer, select QP.          If it is a Partial Re-assessment requested by the Moderator, select MP.</p> <p><i>Note: If the application has been re-assessed multiple times, enter the next Ranking value without deleting the existing text and without spaces i.e. QPMP</i></p>  <p>The screenshot shows the 'Appraisal Details' section of the application system. The 'Ranking' field is set to 'QP'. A red box highlights the 'Appraisal Details' section, and a red arrow points from it to a larger, detailed view of the 'Appraisal Details' form below. In the detailed view, the 'Ranking' field contains 'QP' and is also highlighted with a red box.</p>	Re-Assessment Type Requested from	Enter into Ranking field	QA Reviewer	QP	Moderator	MP
Re-Assessment Type Requested from	Enter into Ranking field						
QA Reviewer	QP						
Moderator	MP						

Re-assessing Applications – Partial Re-assessment

Steps	Actions
10	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>  <p>The screenshot shows a web application interface with a navigation bar at the top containing various menu items like 'Home', 'Programs', 'Organisations', 'Funding Rounds', etc. Below the navigation bar, there are several tabs and a search bar. A dropdown menu is open, displaying options such as 'Undo Record [Ctrl+U]', 'Delete Record [Ctrl+D]', 'New Record [Ctrl+N]', 'Copy Record [Ctrl+B]', 'Save Record [Ctrl+S]', 'New Query [Alt+Q]', and 'Run Query [Alt+ENTER]'. The 'Save Record [Ctrl+S]' option is highlighted with a red box. A red arrow points from a gear icon in the top right corner of the application to the 'Save Record' option in the dropdown menu.</p>
11	You may need a copy of the Application Form and/or the completed Assessment Tool to complete the re-assessment.

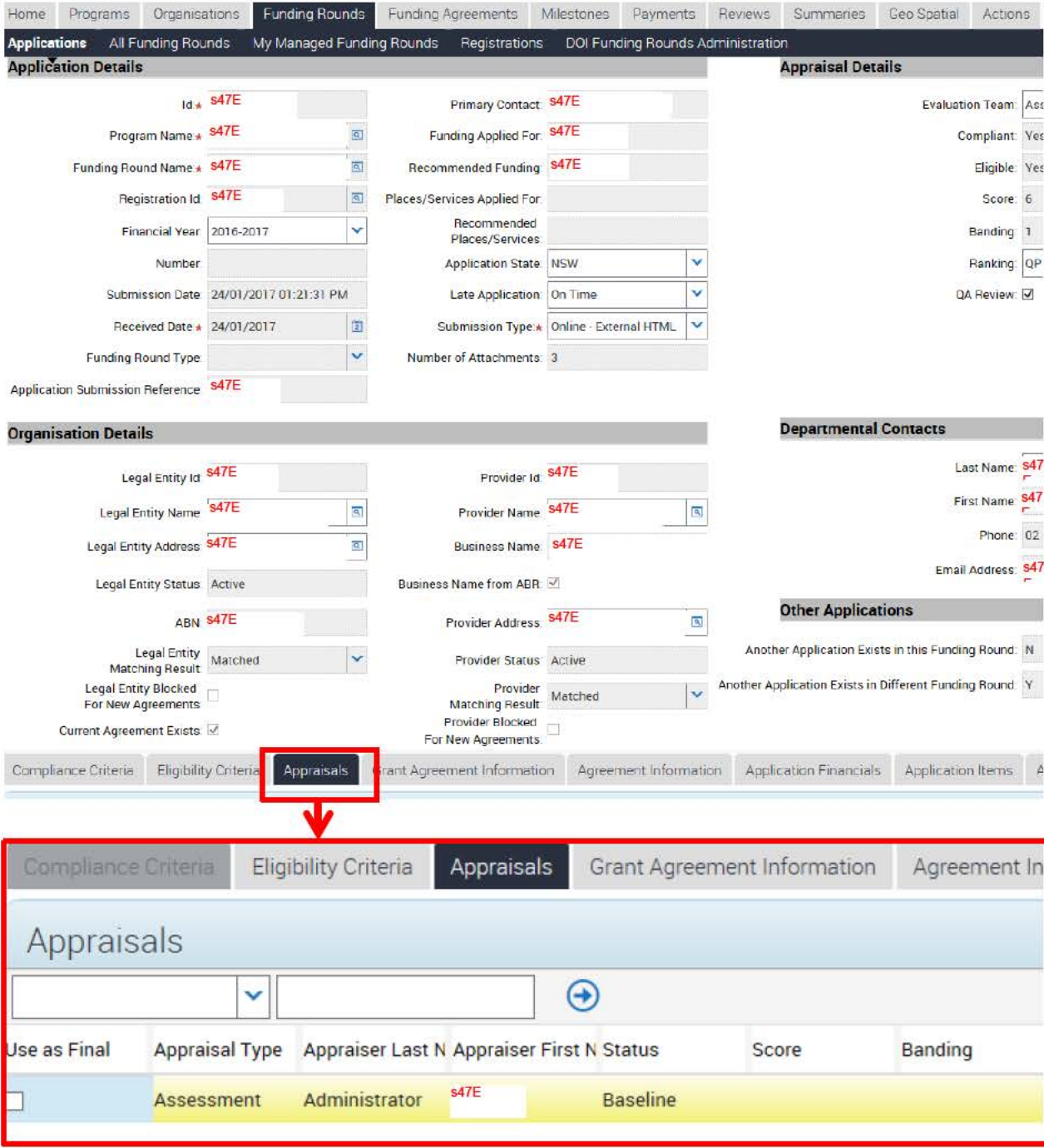
Re-assessing Applications – Partial Re-assessment

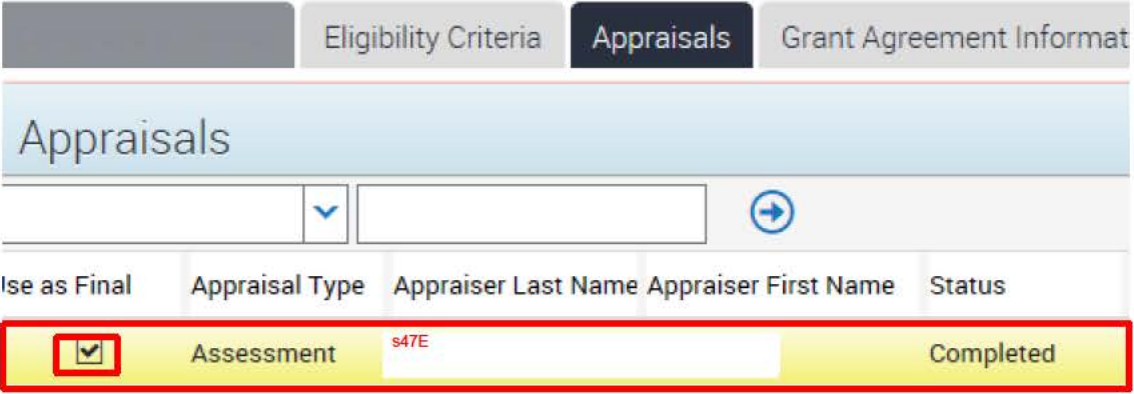

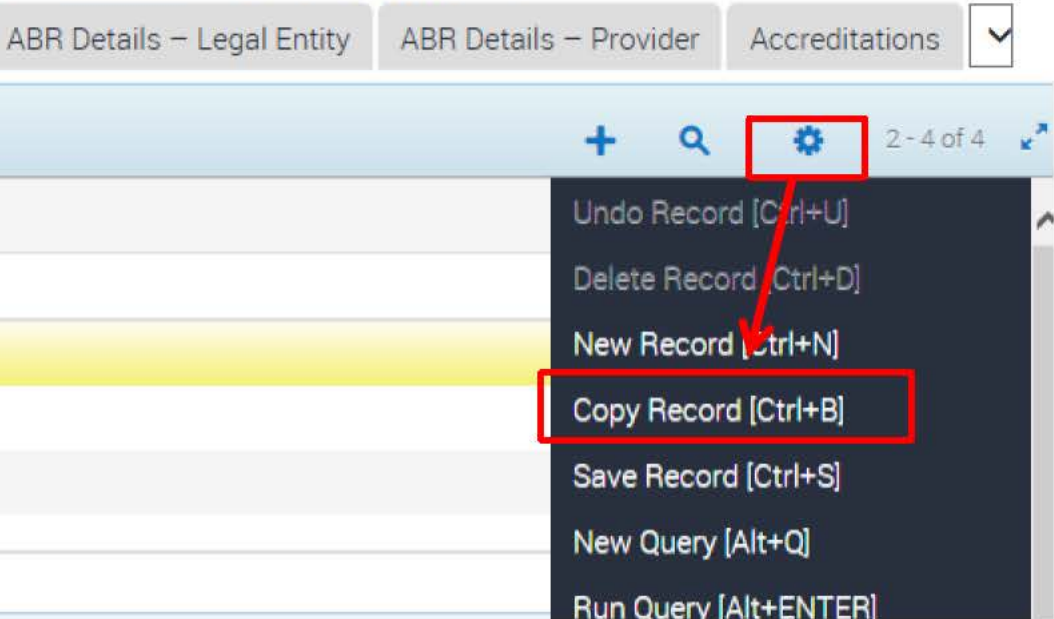
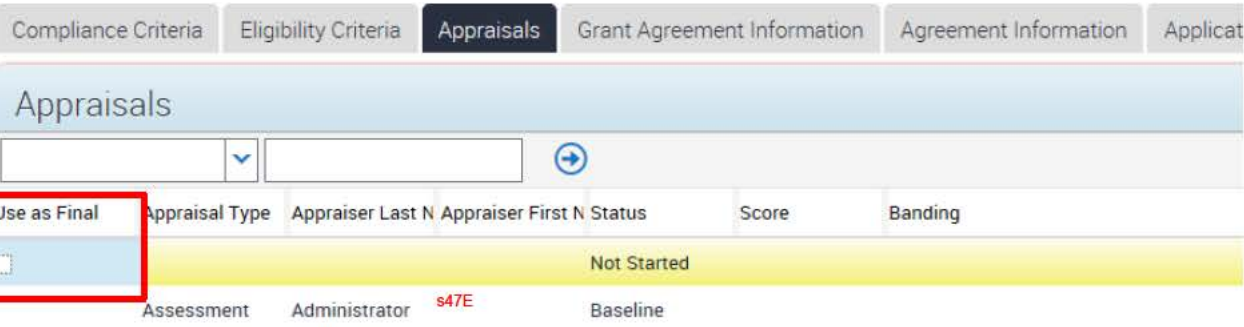
Steps	Actions
12	<p>Click on the <b>Attachments</b> tab.</p> <p><i>Note: If you cannot view the Attachments tab, select Attachments from the drop down list.</i></p>  <p>The screenshot shows a complex web interface with multiple tabs and sections. At the top, there are navigation tabs: Home, Programs, Organisations, Funding Rounds, Funding Agreements, Milestones, Payments, Reviews, Summaries, Geo Spatial, Actions, Literature, Contacts, Child Care, and User Preferences. Below this, there are sub-tabs: Applications, All Funding Rounds, My Managed Funding Rounds, Registrations, and DOI Funding Rounds Administration. The main content area is divided into several sections: Organisation Details, Departmental Contacts, SACS Details, Other Applications, and SACS Award Override Details. At the bottom, there is a row of tabs: Application Items, ABR Details – Legal Entity, Application Description, ABR Details – Provider, Accreditations, and Application Description. The 'Application Description' tab is highlighted, and a dropdown menu is open, showing a list of options: Application Processing Log, Attachments, Boundaries, Contacts, Coverage, Document Production, Document Production History, Fee Sets, Notes, Organisation Description, Places/Services, Reviews, Services Provided, Risk Assessment, Status History, and Target Groups. The 'Attachments' option is highlighted with a red box. A red arrow points from the 'Application Description' dropdown menu to the 'Attachments' tab.</p>

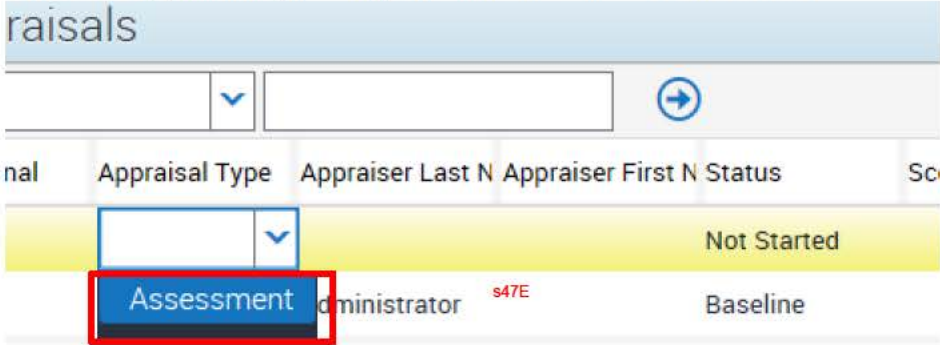

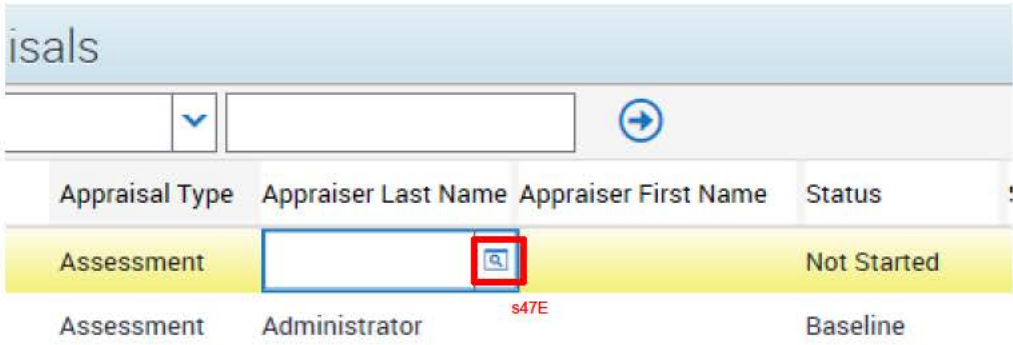
Steps	Actions
13	<p>Click on the <b>Receipt</b> hyperlink to open a copy of the Application Form.</p>  <p>This may also appear as <b>DSS Standard Form Release 2</b>.</p>
14	<p>The following box will open. Click <b>Download</b>, then <b>Open</b>.</p>  <p>If required, open other attachments by selecting the appropriate hyperlink.</p>
15	<p>Open <b>ARC</b> to access the Assessment Tool and the Assessment Matrix by clicking on <b>User Labels</b>.</p> <p><b>ARC Folder – EFXX/XXXXXX</b></p> <p><b>NOTE: See steps 14-15 of the 'Assessing Applications' taskcard for how to access User Labels. If your User Labels are not set up, please speak with your Team Leader.</b></p>
16	<p>Undertake the Partial Re-Assessment.</p>

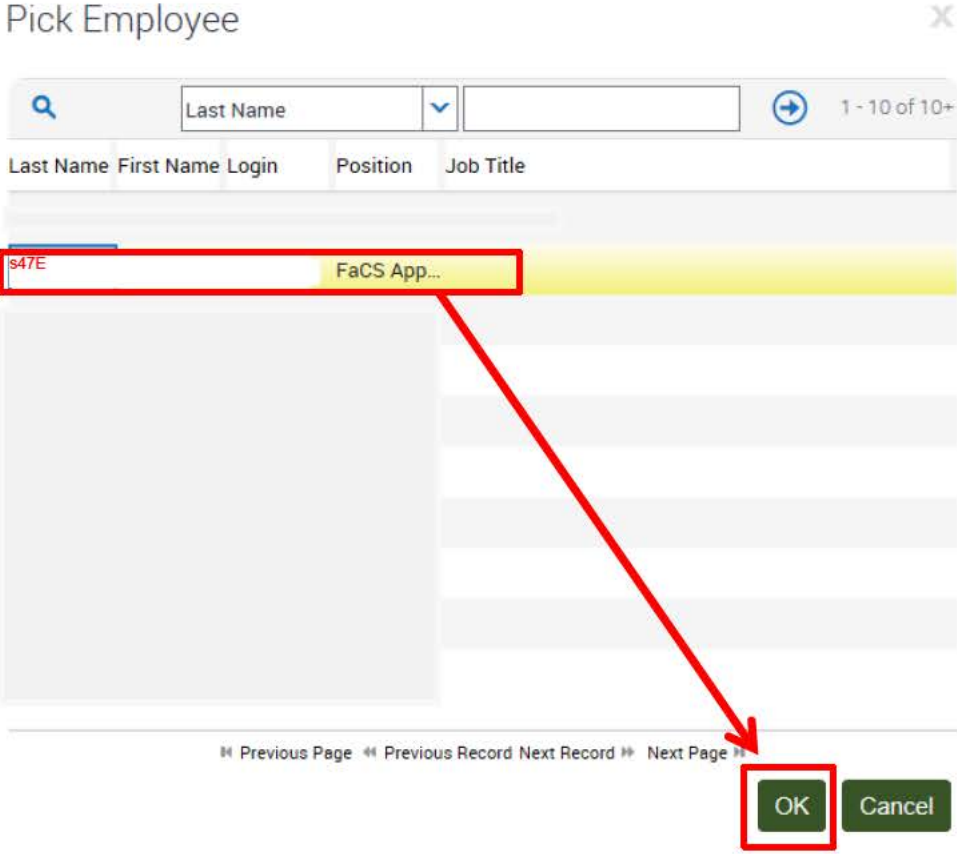
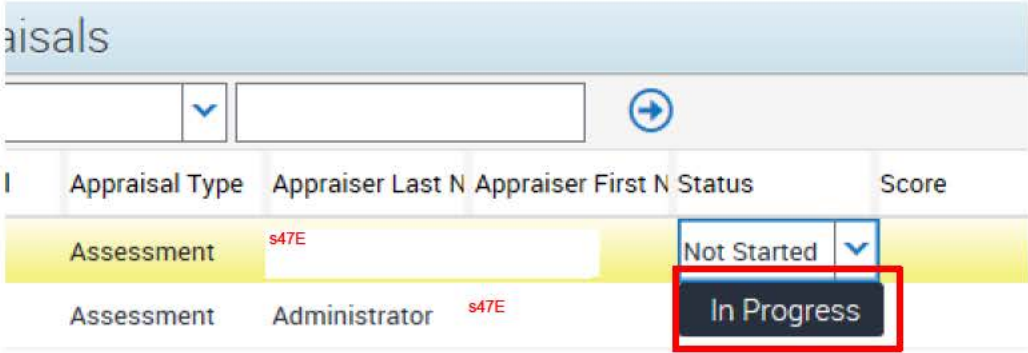



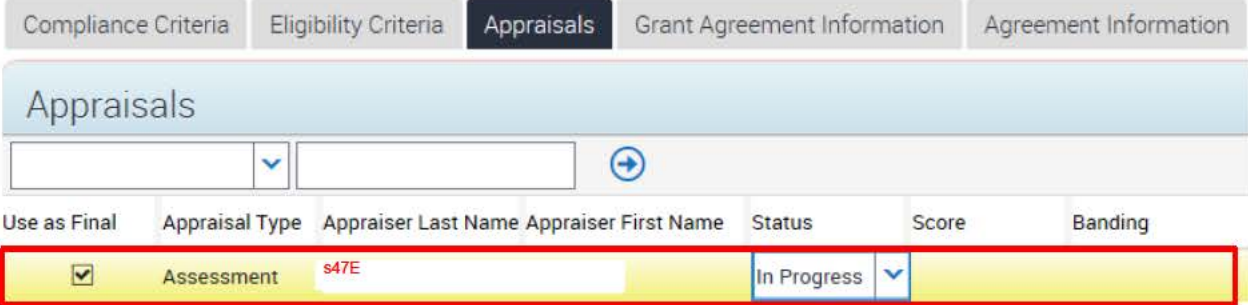
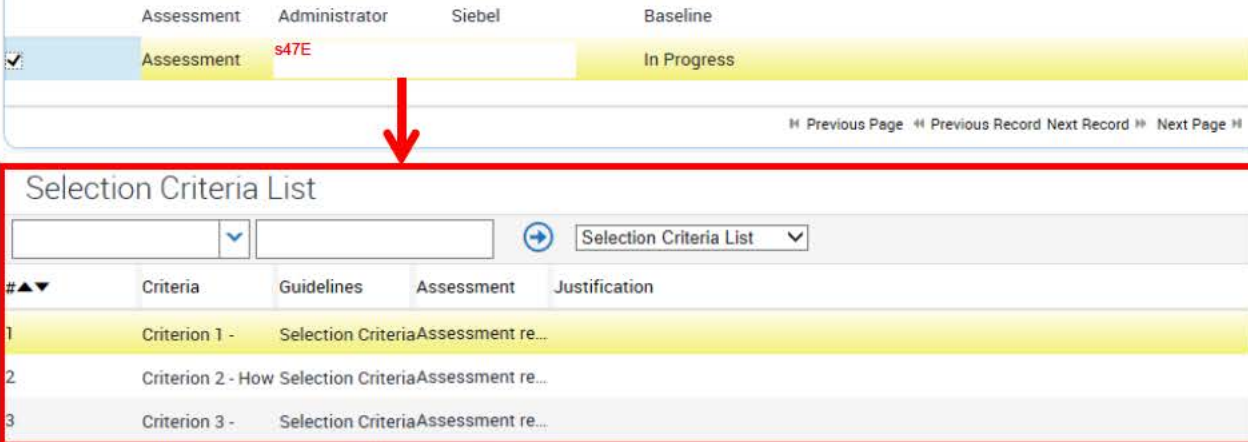
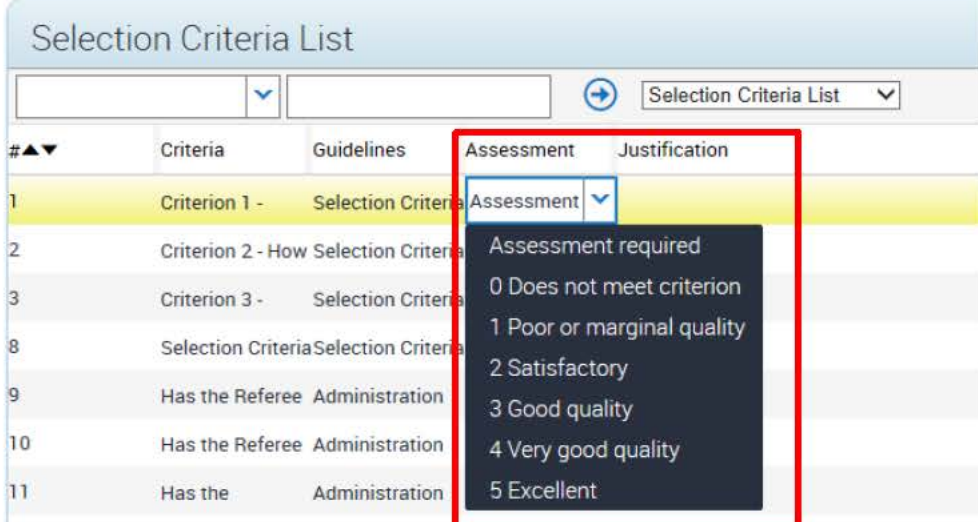
## Update the Assessment in FOFMS

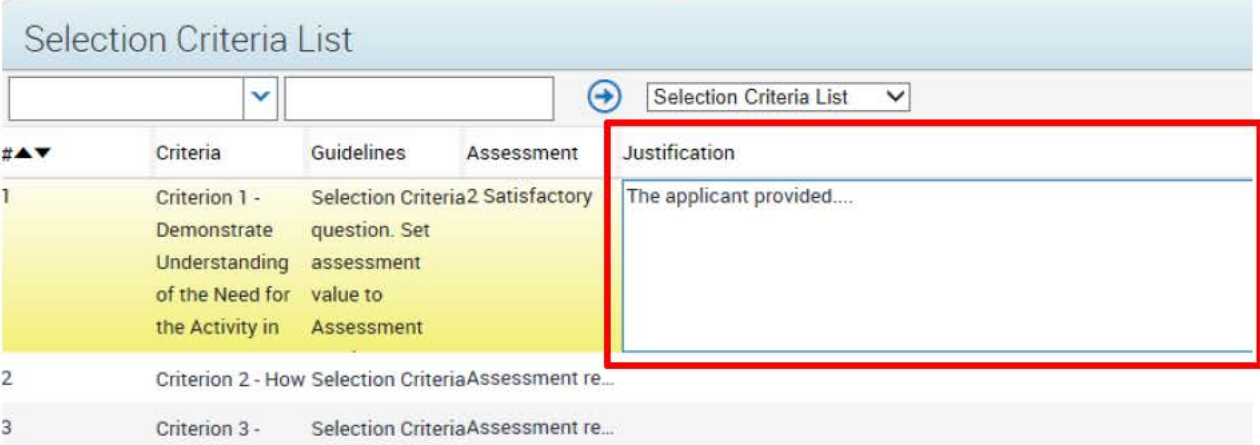
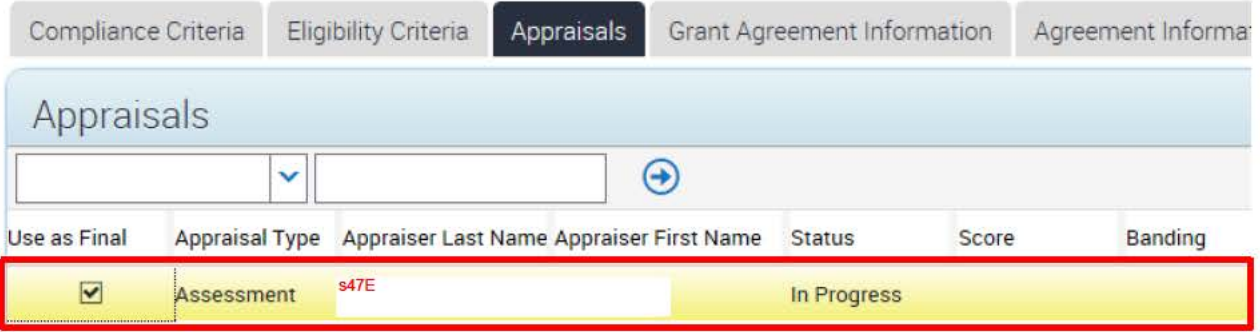
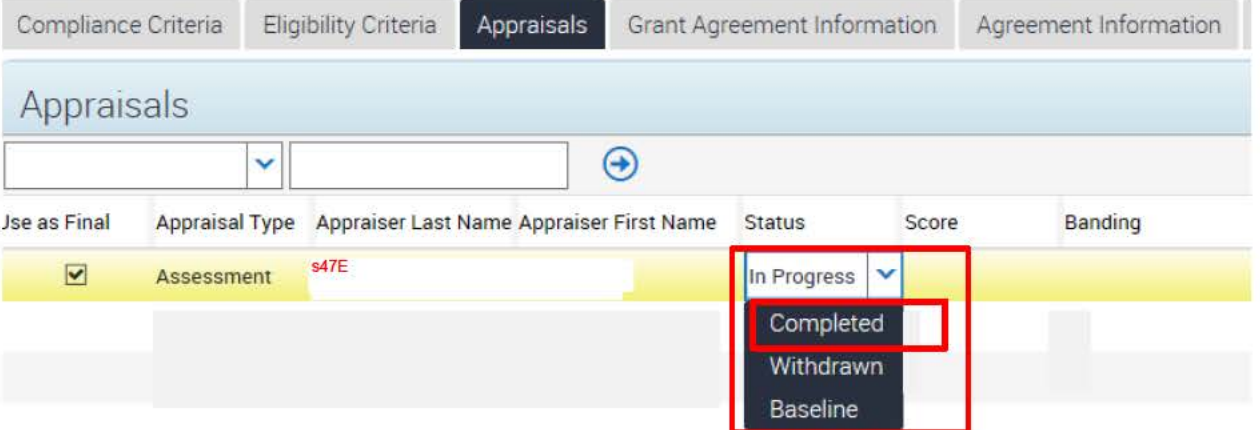
Steps	Actions
17	<p>To update <b>ONLY</b> the Summary of Application and /or the Summary of Assessment fields go to <b>Step 36</b>.</p> <p>To update the Scores/Justifications and the Summary fields go to <b>step 18</b>.</p>
18	<p>Click on the <b>Appraisals</b> tab.</p>  <p>The screenshot displays the 'Application Details' page in FOFMS. The 'Appraisals' tab is highlighted in a red box in the navigation bar. An arrow points from this tab to the 'Appraisals' tab in the main content area. Below the 'Appraisals' tab, a table shows an appraisal entry with columns: Use as Final, Appraisal Type, Appraiser Last N, Appraiser First N, Status, Score, and Banding. The entry shows 'Assessment' as the type, 'Administrator' as the appraiser, and 'Baseline' as the status.</p>

Steps	Actions
19	<p>Highlight the completed <b>Appraisal Record</b> ticked <b>Use as Final</b>.</p>  <p>The screenshot shows a web interface with tabs: Eligibility Criteria, Appraisals (selected), and Grant Agreement Information. Below the tabs is a header 'Appraisals' and a search bar. A table below has columns: Use as Final, Appraisal Type, Appraiser Last Name, Appraiser First Name, and Status. One row is highlighted in yellow with the following values: <input checked="" type="checkbox"/>, Assessment, s47E, and Completed.</p>
20	<p>Click  and select <b>Copy Record</b>.</p>  <p>The screenshot shows a web interface with tabs: ABR Details – Legal Entity, ABR Details – Provider, and Accreditations. Below the tabs is a header 'Appraisals' and a search bar. A table below has columns: Use as Final, Appraisal Type, Appraiser Last Name, Appraiser First Name, and Status. One row is highlighted in yellow. A context menu is open over the row, listing options: Undo Record [Ctrl+U], Delete Record [Ctrl+D], New Record [Ctrl+N], Copy Record [Ctrl+B] (highlighted with a red box), Save Record [Ctrl+S], New Query [Alt+Q], and Run Query [Alt+ENTER]. A red arrow points from the gear icon in the previous step to the context menu.</p>
21	<p>A new <b>Appraisal Record</b> will appear.      Tick <b>Use as Final</b>.</p>  <p>The screenshot shows a web interface with tabs: Compliance Criteria, Eligibility Criteria, Appraisals (selected), Grant Agreement Information, Agreement Information, and Application Information. Below the tabs is a header 'Appraisals' and a search bar. A table below has columns: Use as Final, Appraisal Type, Appraiser Last Name, Appraiser First Name, Status, Score, and Banding. One row is highlighted in yellow with the following values: <input checked="" type="checkbox"/>, Assessment, Administrator, s47E, and Not Started.</p>


Steps	Actions
22	<p data-bbox="209 320 1038 353">From the Appraisal Type drop down menu select <b>Assessment</b>.</p>  <p>The screenshot shows a search bar at the top with the text 'raisals'. Below it is a dropdown menu for 'Appraisal Type' with a blue arrow icon to its right. The dropdown menu is open, showing a list of options. The option 'Assessment' is highlighted in blue and has a red rectangular box drawn around it. Other visible options include 'Not Started' and 'Baseline'. The background shows a table with columns: 'Appraisal Type', 'Appraiser Last N', 'Appraiser First N', 'Status', and 'Score'. The 'Assessment' row is highlighted in yellow.</p>
23	<p data-bbox="209 808 855 842">In the <b>Appraiser Last Name</b> field, click the glyph </p>  <p>The screenshot shows the same search bar with 'isals'. Below it is a table with columns: 'Appraisal Type', 'Appraiser Last Name', 'Appraiser First Name', 'Status', and 'Score'. The 'Appraisal Type' column has a dropdown menu. The 'Appraiser Last Name' field is highlighted in yellow and contains a search glyph icon (a magnifying glass inside a square) which is highlighted with a red rectangular box. The 'Assessment' row is highlighted in yellow. The background shows a table with columns: 'Appraisal Type', 'Appraiser Last Name', 'Appraiser First Name', 'Status', and 'Score'. The 'Assessment' row is highlighted in yellow.</p>

Steps	Actions
<p>24</p>	<p>A pop up box will open. Highlight your name. Click <b>OK</b>.</p> 
<p>25</p>	<p>Change the <b>Status</b> to <b>In Progress</b>.</p> 
<p>26</p>	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>

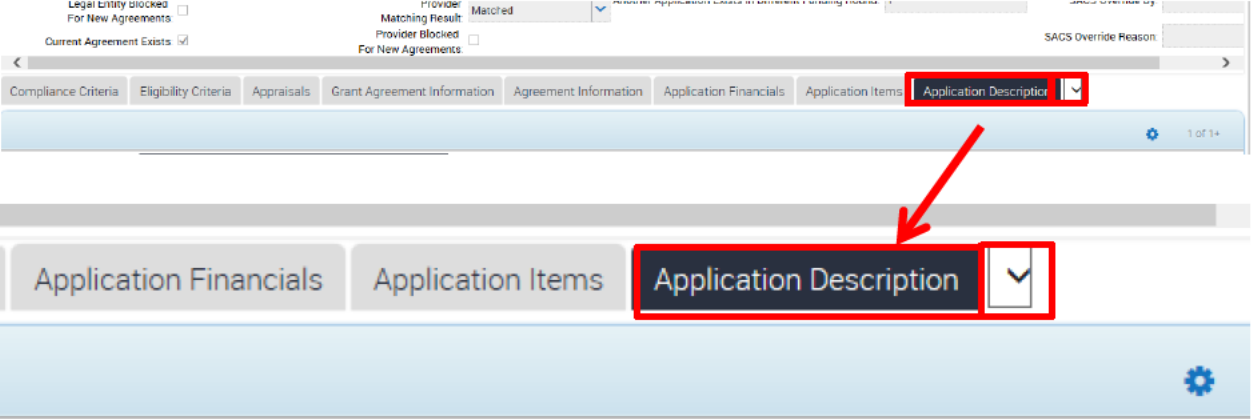
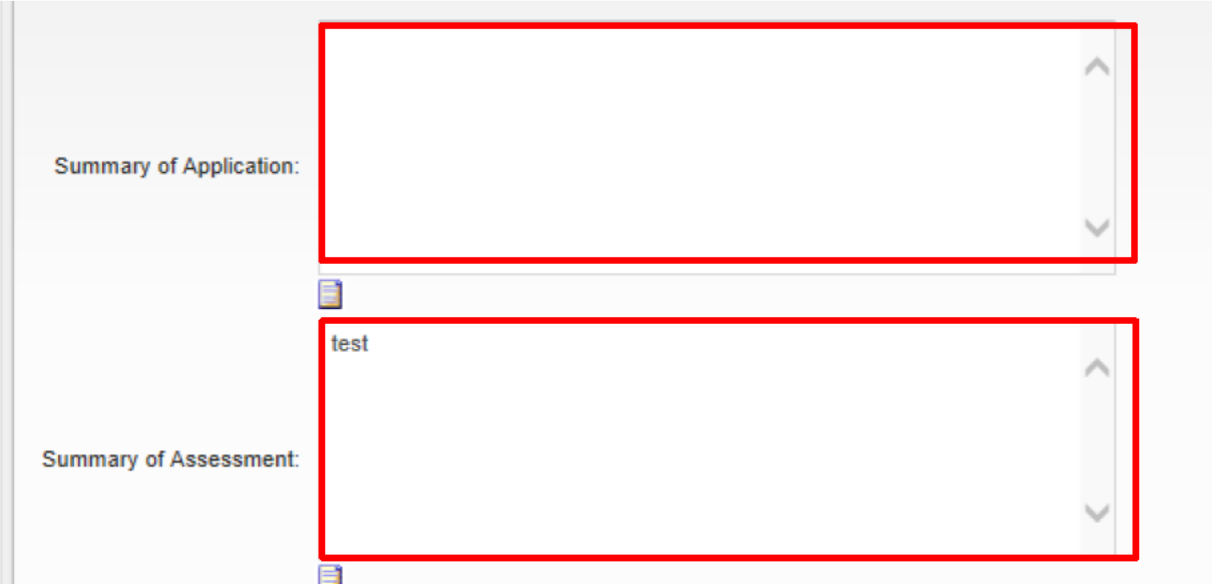

Steps	Actions
27	<p>Highlight the appraisal record ticked as <b>Use as Final</b> and the status as <b>In Progress</b>.</p> 
28	<p>Scroll down to the <b>Selection Criteria List</b>.</p> 
29	<p>If required to update a score for a criterion, enter the Score by selecting it from the <b>Assessment</b> drop down menu.</p> <ul style="list-style-type: none"> <li>• 1 = Poor or Limited</li> <li>• 2 = Satisfactory</li> <li>• 3 = Good</li> <li>• 4 = Very Good</li> <li>• 5 = Excellent</li> </ul> 

Steps	Actions
<p><b>30</b></p>	<p>If required to update the Justification for a criterion, copy the text from the Assessment Tool into the corresponding <b>Justification</b> field.</p> <p><i>Note: Each field has a 4000 character limit including spaces.</i></p>  <p>The screenshot shows a 'Selection Criteria List' interface. At the top, there are search filters and a dropdown menu set to 'Selection Criteria List'. Below this is a table with the following columns: #, Criteria, Guidelines, Assessment, and Justification. The first row is highlighted in yellow. The 'Justification' column for this row contains the text 'The applicant provided...'. A red box highlights the 'Justification' column header and the text area for the first row.</p>
<p><b>31</b></p>	<p>Highlight the appraisal record ticked as <b>Use as Final</b> with the status <b>In Progress</b>.</p>  <p>The screenshot shows the 'Appraisals' interface. At the top, there are tabs for 'Compliance Criteria', 'Eligibility Criteria', 'Appraisals', 'Grant Agreement Information', and 'Agreement Information'. Below the tabs is a search bar and a table with the following columns: Use as Final, Appraisal Type, Appraiser Last Name, Appraiser First Name, Status, Score, and Banding. The first row is highlighted in yellow. The 'Use as Final' column has a checked checkbox, the 'Appraisal Type' is 'Assessment', and the 'Status' is 'In Progress'. A red box highlights the entire first row.</p>
<p><b>32</b></p>	<p>Change the status from <b>In Progress</b> to <b>Completed</b>.</p>  <p>The screenshot shows the 'Appraisals' interface, similar to step 31. The 'Status' column of the first row is highlighted in yellow. A dropdown menu is open for this cell, showing the following options: 'In Progress', 'Completed', 'Withdrawn', and 'Baseline'. A red box highlights the dropdown menu, and a smaller red box highlights the 'Completed' option.</p>

Re-assessing Applications – Partial Re-assessment

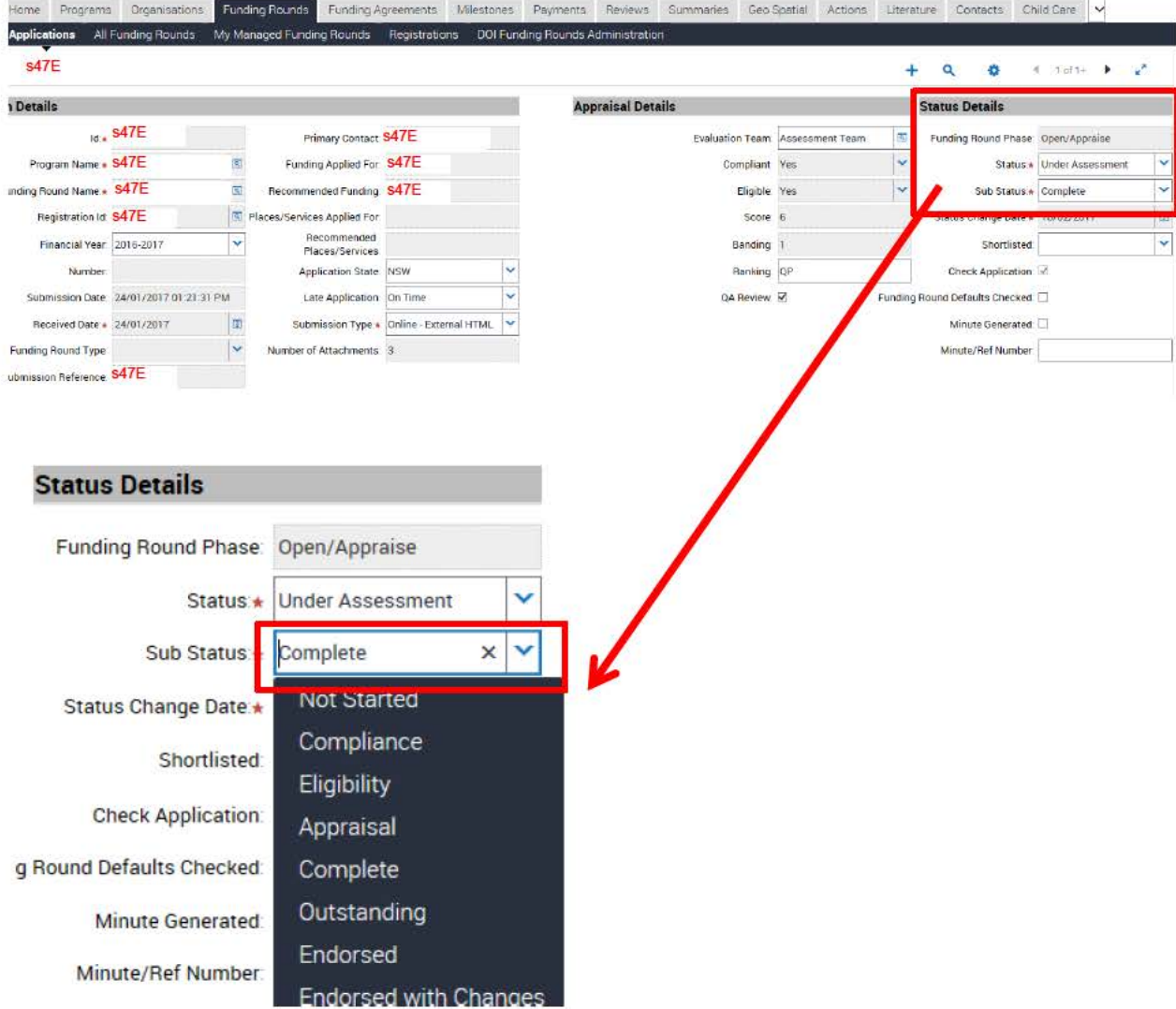

Steps	Actions												
<p>33</p>	<p>A <b>Score</b> and <b>Banding</b> will populate based on your updated assessment.</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Appraiser Last Name</th> <th>Appraiser First Name</th> <th>Status</th> <th>Score</th> <th>Banding</th> </tr> </thead> <tbody> <tr> <td>s47E</td> <td></td> <td></td> <td>Completed</td> <td>6</td> <td>1</td> </tr> </tbody> </table>	Type	Appraiser Last Name	Appraiser First Name	Status	Score	Banding	s47E			Completed	6	1
Type	Appraiser Last Name	Appraiser First Name	Status	Score	Banding								
s47E			Completed	6	1								
<p>34</p>	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>												
<p>35</p>	<p>If you are required to also update the <b>Summary of Application</b> and/or the <b>Summary of Assessment</b> go to <b>Step 36</b> otherwise go to <b>Step 39</b>.</p>												

## Update the Summary of Application and Assessment

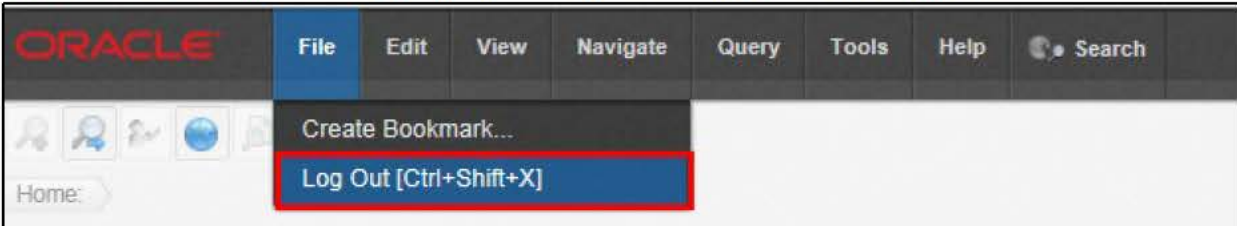
Steps	Actions
<p>36</p>	<p>Select the <b>Application Description</b> tab.</p> <p><i>Note: If you cannot view the Application Description, select Application Description from the drop down list.</i></p> 
<p>37</p>	<p>To update the <b>Summary of Application</b>, copy the text from Summary of Application in the Assessment Tool into the Summary of Application field.</p> <p>To update the <b>Summary of Assessment</b>, copy the text from Summary of Assessment in the Assessment Tool into the Summary of Assessment field.</p> <p><i>Note: Each field has a 2000 character limit including spaces.</i></p> 
<p>38</p>	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>



## Complete the Partial Re-Assessment in FOFMS

Steps	Actions
<p><b>39</b></p>	<p><b>Change the Application Sub Status to Complete.</b></p>  <p>The screenshot shows the 'Details' and 'Appraisal Details' sections of the FOFMS interface. The 'Status Details' section is highlighted with a red box. A red arrow points from this box to a dropdown menu for 'Sub Status' which is also highlighted with a red box. The dropdown menu shows 'Complete' as the selected option.</p> <p><b>Status Details</b></p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: Under Assessment</p> <p>Sub Status: Complete</p> <p>Status Change Date: Not Started</p> <p>Shortlisted: Compliance</p> <p>Check Application: Eligibility</p> <p>Funding Round Defaults Checked: Appraisal</p> <p>Minute Generated: Complete</p> <p>Minute/Ref Number: Outstanding</p> <p>Endorsed</p> <p>Endorsed with Changes</p>
<p><b>40</b></p>	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>

## Log out of FOFMS

Steps	Actions
1	<p>To log out of FOFMS select <b>File</b> then <b>Log Out</b> or use shortcut <b>Ctrl+Shift+X</b>.</p>  <p>The screenshot shows the Oracle FOFMS application interface. At the top, there is a menu bar with the following items: ORACLE, File, Edit, View, Navigate, Query, Tools, Help, and Search. The 'File' menu is currently open, displaying a dropdown list of options. The 'Log Out [Ctrl+Shift+X]' option is highlighted with a red rectangular box. Other visible options in the dropdown include 'Create Bookmark...'. Below the menu bar, there are several icons and a 'Home:' button.</p>

## Need Help?

For further assistance please speak to your Team Leader.



# FOFMS TASKCARD

## Full Re-Assessment

This task card will take an Assessor through the process of completing a full **re-assessment** of an application in FOFMS.

A full re-assessment should be undertaken where an entirely new appraisal is required by a different assessor. The initial assessment must have been completed, a QA Review completed, a Moderation completed and a full re-assessment triggered.

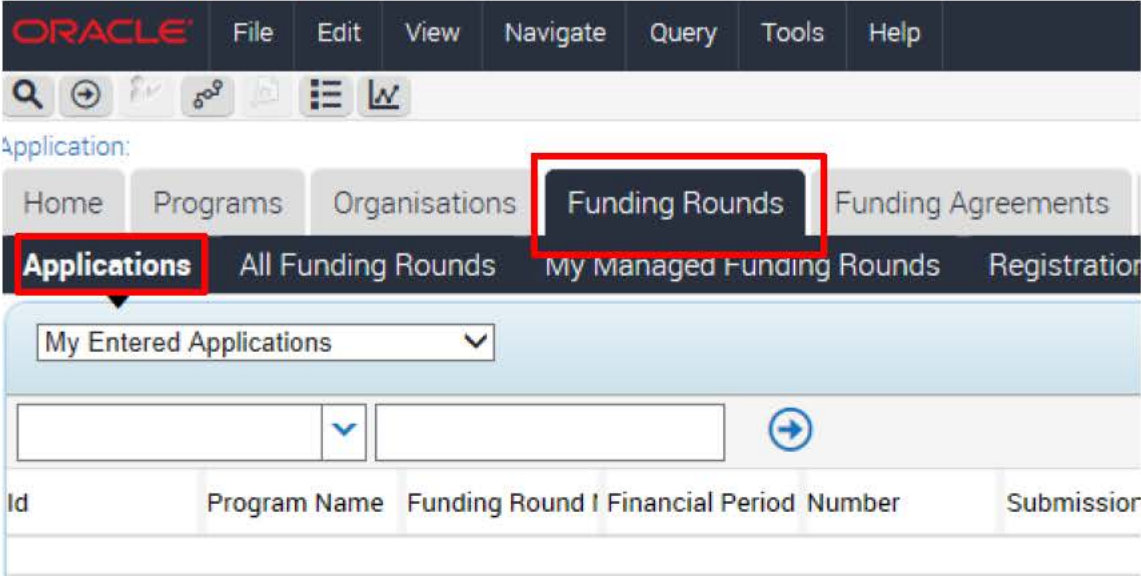
**Before you begin ensure you have;**

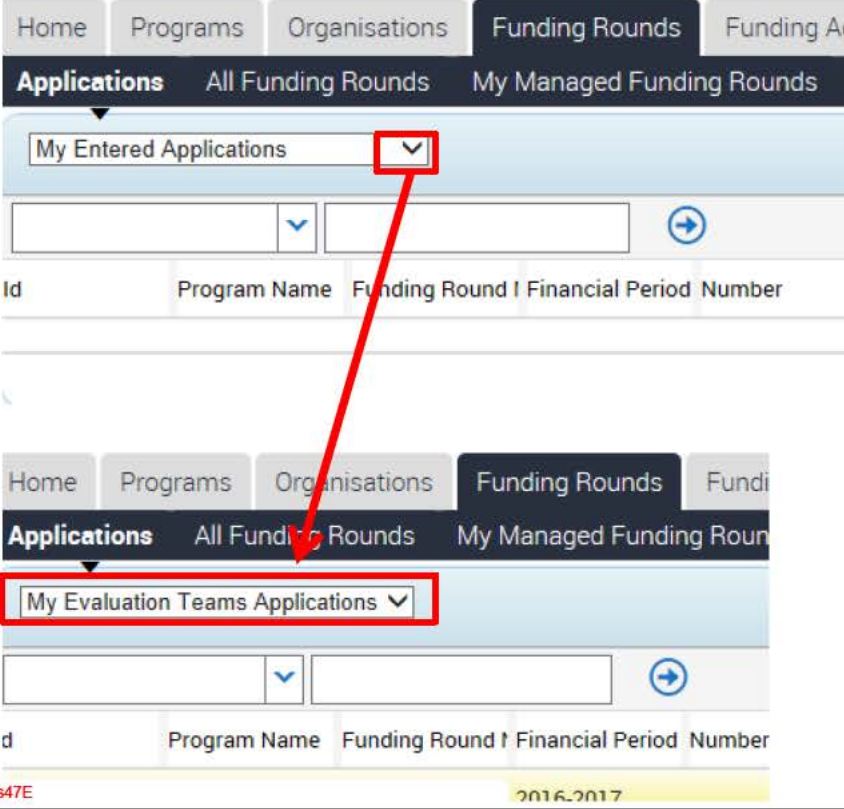
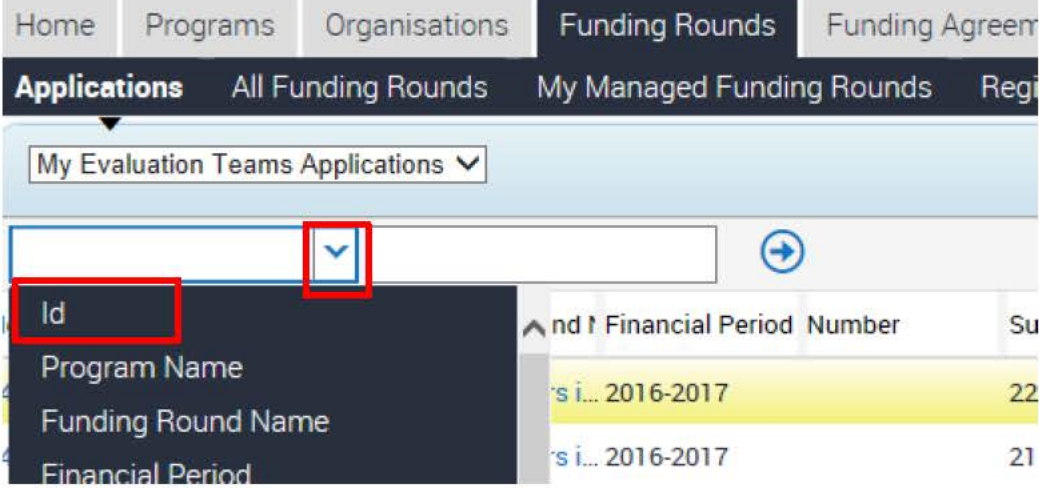
- The Application Id of the record you will be assessing


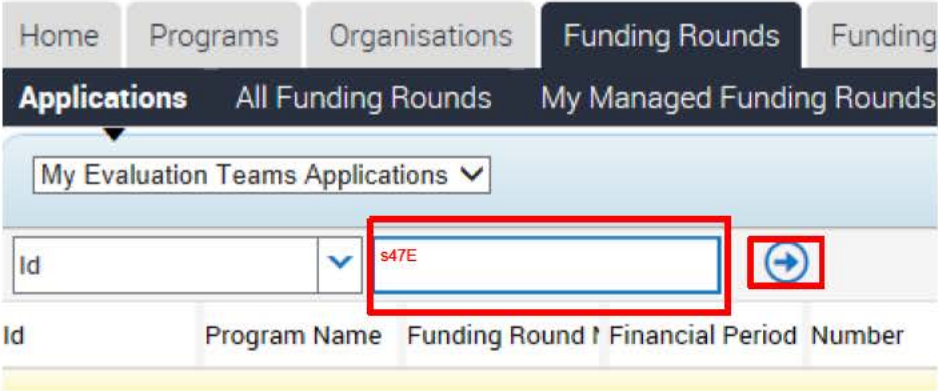
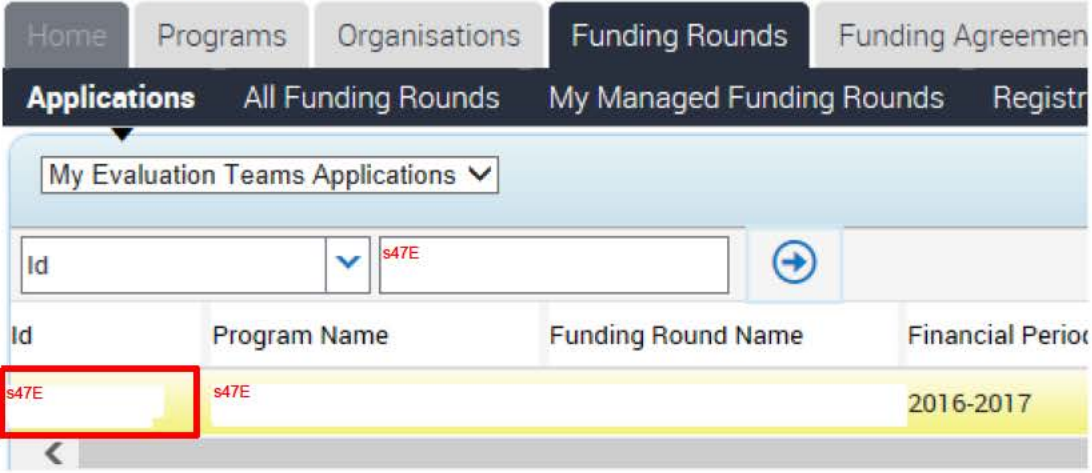
**FOFMS Access Required:**

- FOFMS Application Appraiser

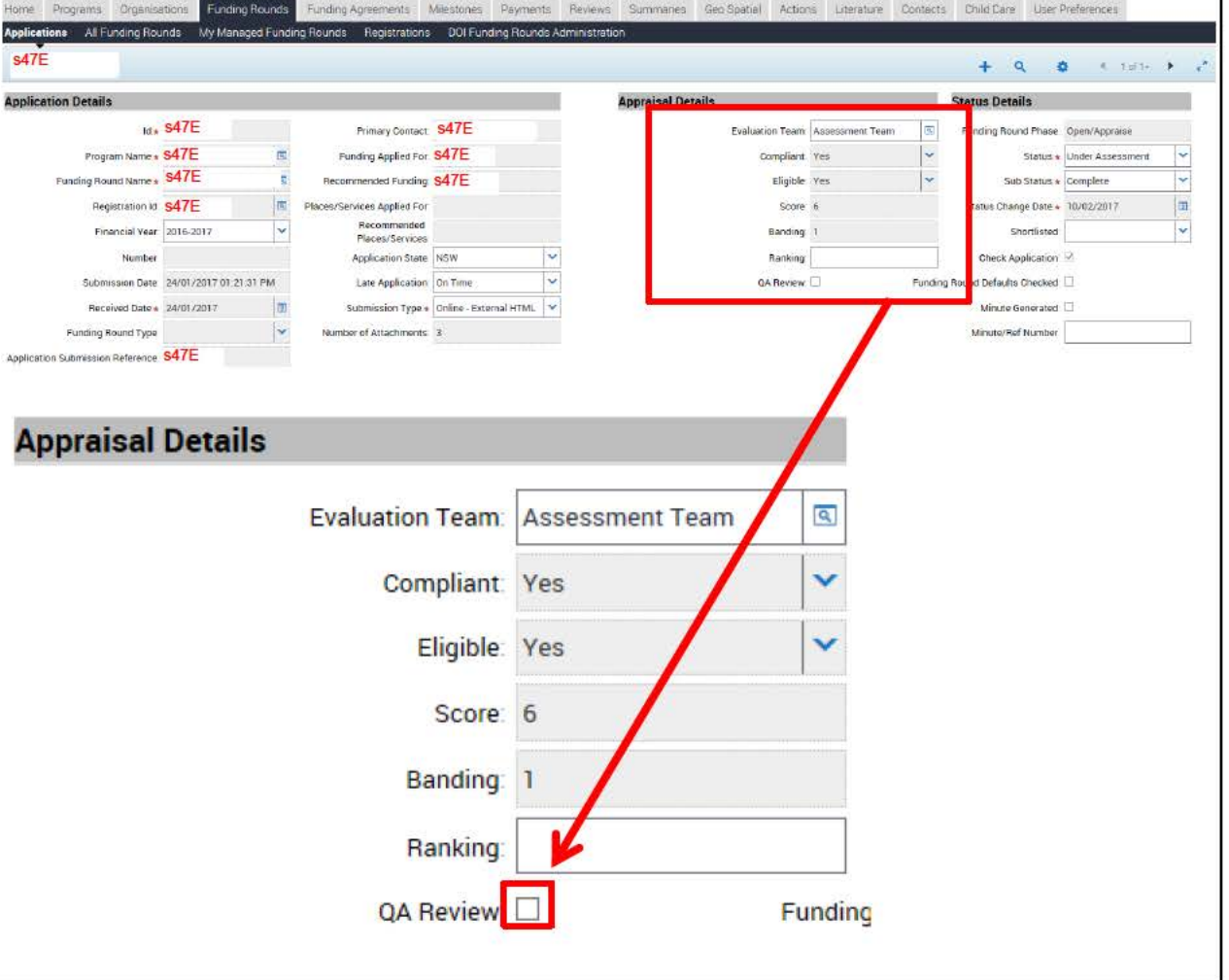
## Open the Application Record

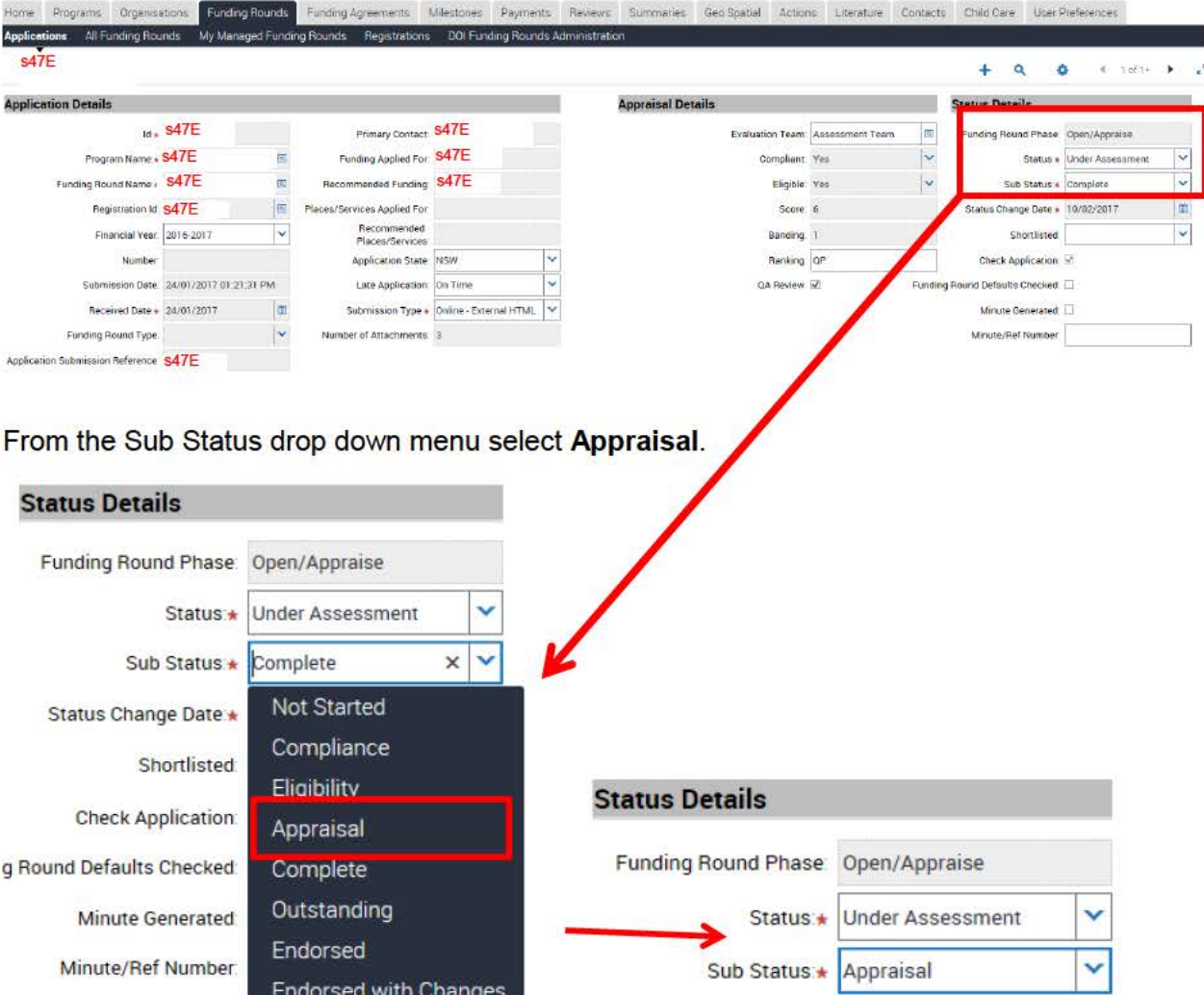
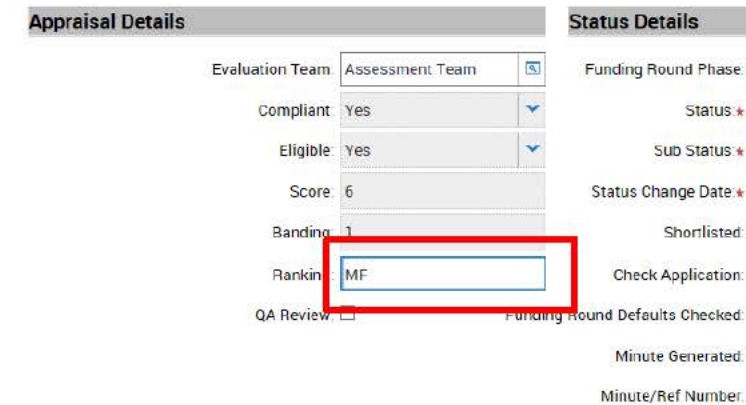
Steps	Actions
1	Open <b>FOFMS</b> to access the Application Record
2	<p>Click on the <b>Funding Rounds</b> tab.            Click on the <b>Applications</b> link.</p>  <p>The screenshot shows the Oracle application interface. At the top is a menu bar with 'ORACLE', 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below this is a toolbar with various icons. The main content area has a navigation bar with tabs: 'Home', 'Programs', 'Organisations', 'Funding Rounds', and 'Funding Agreements'. The 'Funding Rounds' tab is highlighted with a red box. Below this is another navigation bar with tabs: 'Applications', 'All Funding Rounds', 'My Managed Funding Rounds', and 'Registration'. The 'Applications' tab is also highlighted with a red box. Below the navigation bars is a dropdown menu labeled 'My Entered Applications' with a downward arrow. Below that are two input fields with dropdown arrows and a blue circular arrow icon. At the bottom is a table header with columns: 'Id', 'Program Name', 'Funding Round', 'Financial Period', 'Number', and 'Submission'.</p>

Steps	Actions
<p>3</p>	<p>Click on the drop down menu            Select <b>My Evaluation Team's Applications</b>.</p>  <p>The screenshot shows a navigation menu with 'Applications' selected. Below it, a dropdown menu is open, showing 'My Entered Applications' with a red box around the dropdown arrow. A red arrow points to the second screenshot, which shows the dropdown menu with 'My Evaluation Teams Applications' selected and highlighted with a red box. Below the dropdown is a search bar and a table with columns: Id, Program Name, Funding Round, Financial Period, and Number. A row is highlighted in yellow with 's47E' and '2016-2017'.</p>
<p>4</p>	<p>Click on the drop down menu.            Select <b>Id</b>.</p>  <p>The screenshot shows the same navigation menu. The dropdown menu is open, showing 'My Evaluation Teams Applications' selected. Below it, a search bar and a table are visible. A dropdown menu is open over the table, with 'Id' selected and highlighted with a red box. The table has columns: Id, Program Name, Funding Round Name, Financial Period, and Number. Two rows are highlighted in yellow with 's i... 2016-2017' and values '22' and '21'.</p>


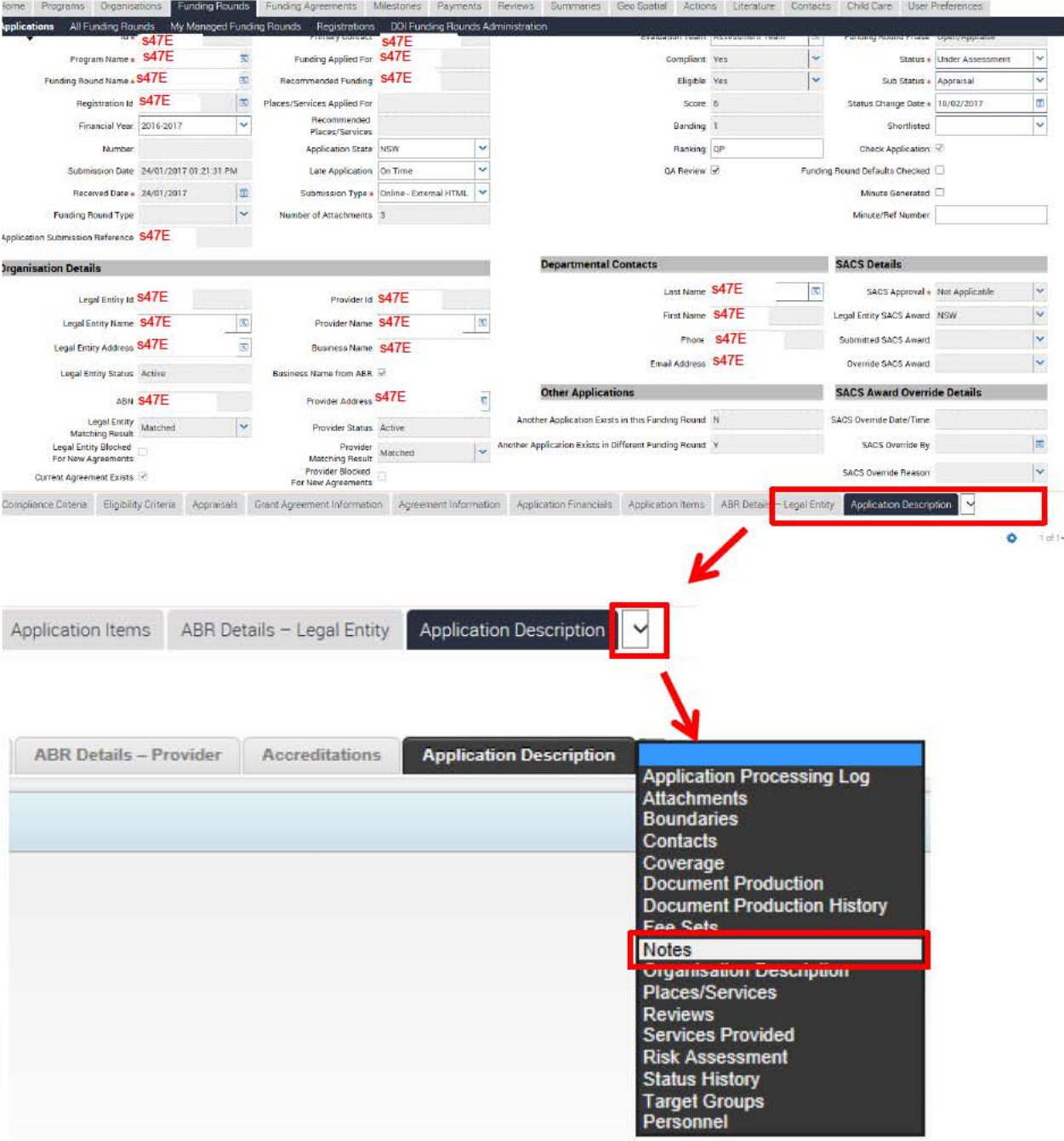
Steps	Actions
<p>5</p>	<p>Enter the <b>Application Id</b> in the next field. Click .</p> 
<p>6</p>	<p>The application record will open.          Click on the <b>hyperlink</b> in the <b>Id</b> column.</p> 

Re-assessing Applications – Full Re-assessment

Steps	Actions																
7	<p>The Application Record will open. Check that the QA review box is <b>un-ticked</b>.</p>  <p>The screenshot shows the application record for ID s47E. The 'Appraisal Details' section includes the following information:</p> <table border="1"><thead><tr><th>Field</th><th>Value</th></tr></thead><tbody><tr><td>Evaluation Team</td><td>Assessment Team</td></tr><tr><td>Compliant</td><td>Yes</td></tr><tr><td>Eligible</td><td>Yes</td></tr><tr><td>Score</td><td>6</td></tr><tr><td>Banding</td><td>1</td></tr><tr><td>Ranking</td><td></td></tr><tr><td>QA Review</td><td><input type="checkbox"/></td></tr></tbody></table> <p>The 'QA Review' checkbox is highlighted with a red box, and a red arrow points to it from the 'Appraisal Details' section above.</p>	Field	Value	Evaluation Team	Assessment Team	Compliant	Yes	Eligible	Yes	Score	6	Banding	1	Ranking		QA Review	<input type="checkbox"/>
Field	Value																
Evaluation Team	Assessment Team																
Compliant	Yes																
Eligible	Yes																
Score	6																
Banding	1																
Ranking																	
QA Review	<input type="checkbox"/>																


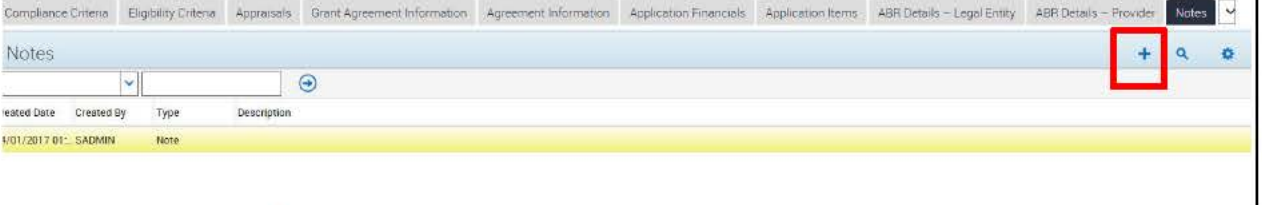
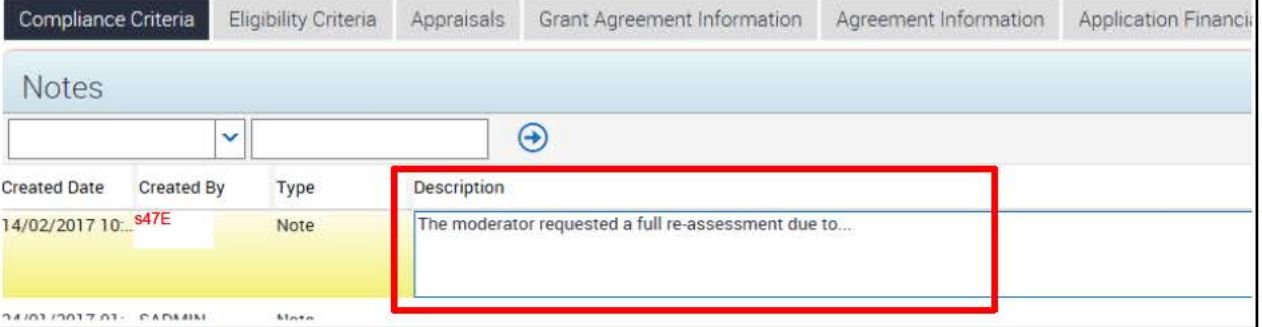

Steps	Actions
<p><b>8</b></p>	<p><b>Change the Sub Status to Appraisal.</b></p>  <p>From the Sub Status drop down menu select <b>Appraisal</b>.</p> <p><b>Status Details</b></p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: Under Assessment</p> <p>Sub Status: Complete</p> <p>Status Change Date: Not Started</p> <p>Shortlisted: Compliance</p> <p>Check Application: Eligibility</p> <p>Funding Round Defaults Checked: Appraisal</p> <p>Minute Generated: Complete</p> <p>Minute/Ref Number: Outstanding</p> <p>Endorsed</p> <p>Endorsed with Changes</p> <p><b>Status Details</b></p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: Under Assessment</p> <p>Sub Status: Appraisal</p>
<p><b>9</b></p>	<p><b>Enter MF in the Ranking field.</b></p> <p>MF indicates that a Moderator has requested a full re-assessment.</p> <p><i>Note: If the Application has been re-assessed multiple times, enter the next Ranking value without deleting the existing text and without spaces i.e. QPMF</i></p>  <p><b>Appraisal Details</b></p> <p>Evaluation Team: Assessment Team</p> <p>Compliant: Yes</p> <p>Eligible: Yes</p> <p>Score: 6</p> <p>Banding: 1</p> <p>Ranking: MF</p> <p>QA Review: <input type="checkbox"/></p> <p><b>Status Details</b></p> <p>Funding Round Phase:</p> <p>Status:</p> <p>Sub Status:</p> <p>Status Change Date:</p> <p>Shortlisted:</p> <p>Check Application:</p> <p>Funding Round Defaults Checked:</p> <p>Minute Generated:</p> <p>Minute/Ref Number:</p>

Re-assessing Applications – Full Re-assessment

Steps	Actions
10	<p>Select the <b>Notes</b> tab (it may be in the  drop down list).</p> <p><i>Note: If you cannot view the Notes tab, select <b>Notes</b> from the drop down list.</i></p> 



Re-assessing Applications – Full Re-assessment

Steps	Actions
11	<p>Select the  button.</p> 
12	<p>In the Description field enter a note describing why a full re-assessment is required.</p> 
13	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>
14	<p>Open the FOFMS Task Card <b>Assessing Applications</b> and follow from step 14 until completion.</p>



# FOFMS TASKCARD

## Moderating Assessments

This task card will take a Moderator through the process of moderating an assessment and completing in FOFMS.

Contents	Page
Open the Assessment Tool and the Assessment Matrix .....	2
Moderate the Assessment .....	9
Finalise the Moderation in FOFMS .....	14
Log Out of FOFMS .....	20
Need Help? .....	20

### Before you begin ensure you have:

- The details of the completed assessment that is ready for moderation
  - FOFMS ID
  - Organisation Name
  - Moderator Guide

### FOFMS Access Required:

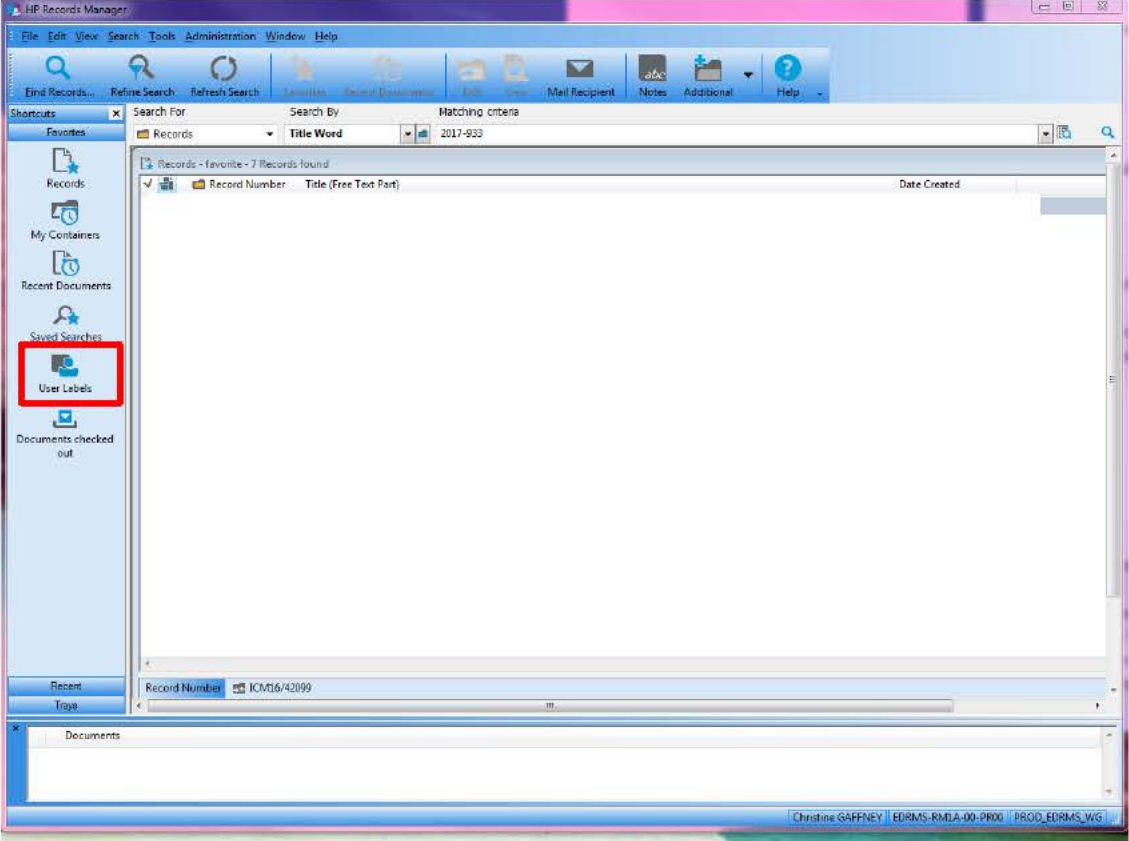
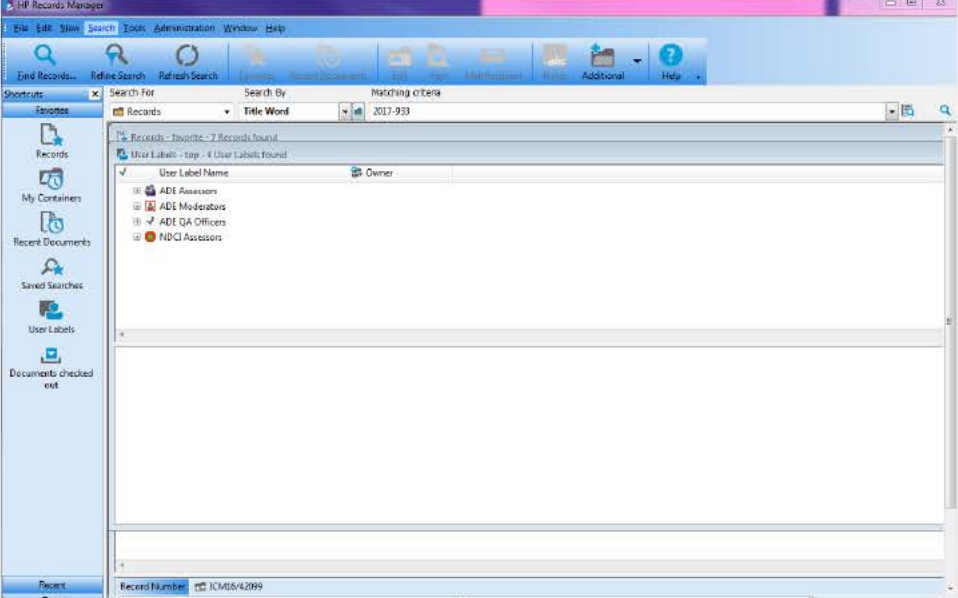
- FOFMS Funding Round Manager

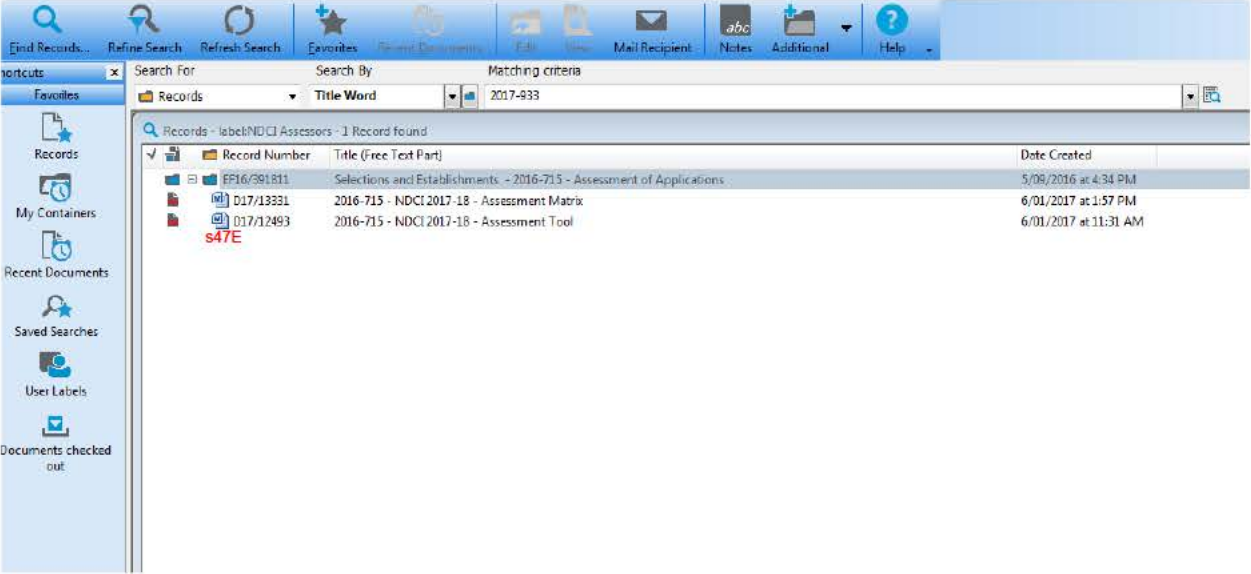
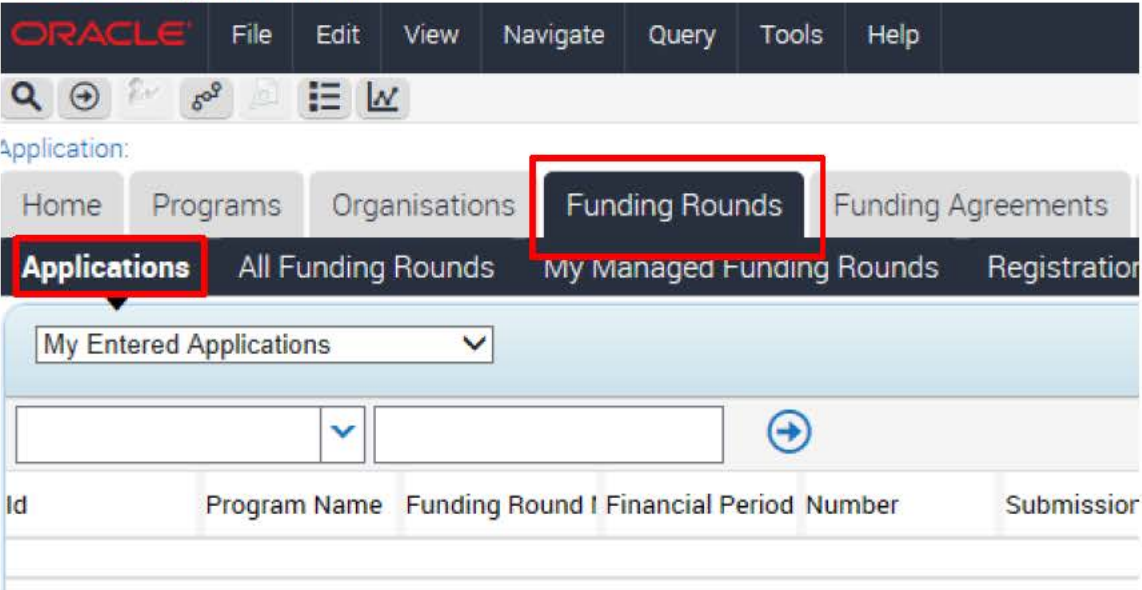
**\*If at any step you feel you have made an incorrect selection, press 'Esc' and attempt the step again. If this fails to resolve the issue, speak to your Team Leader.**

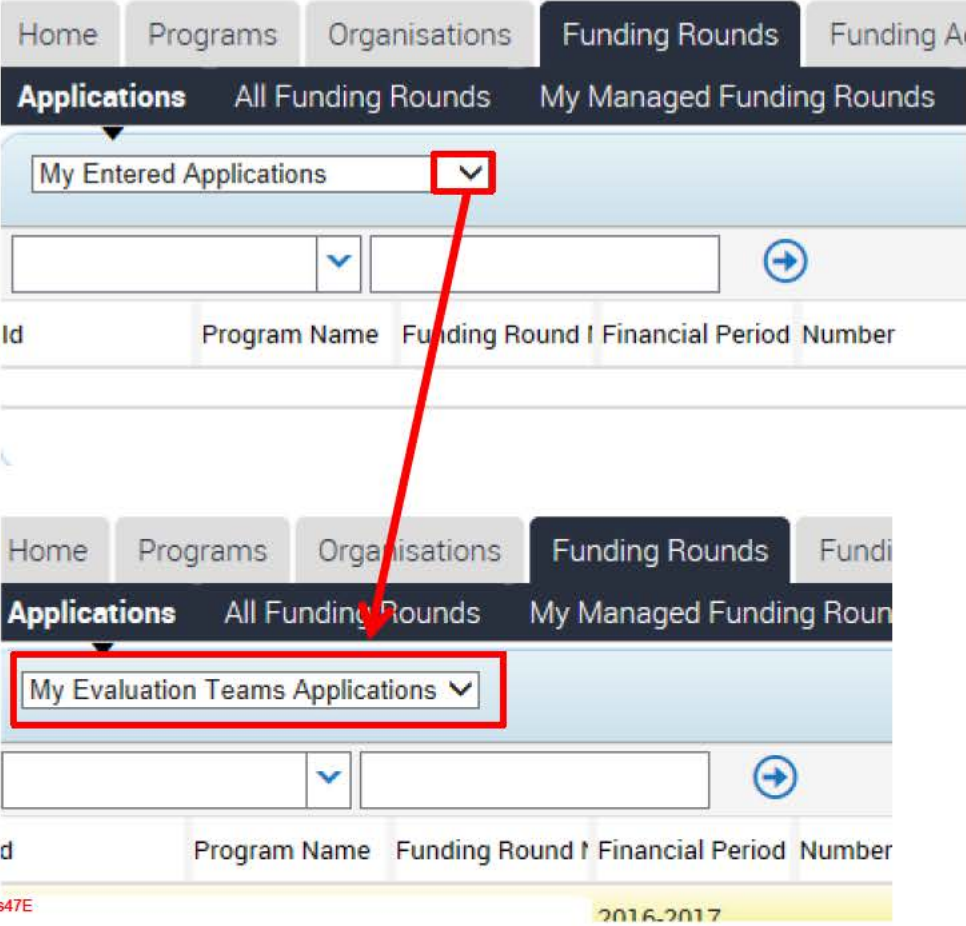
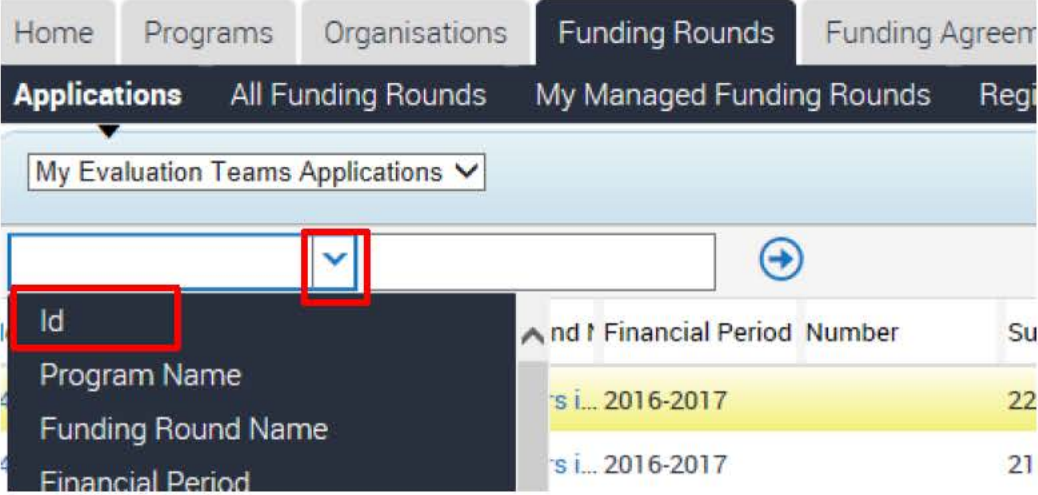
### Update Instructions For Each Funding Round


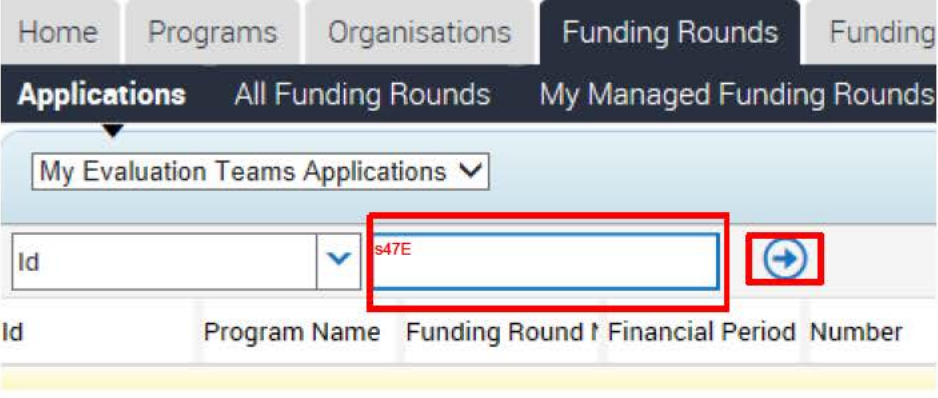
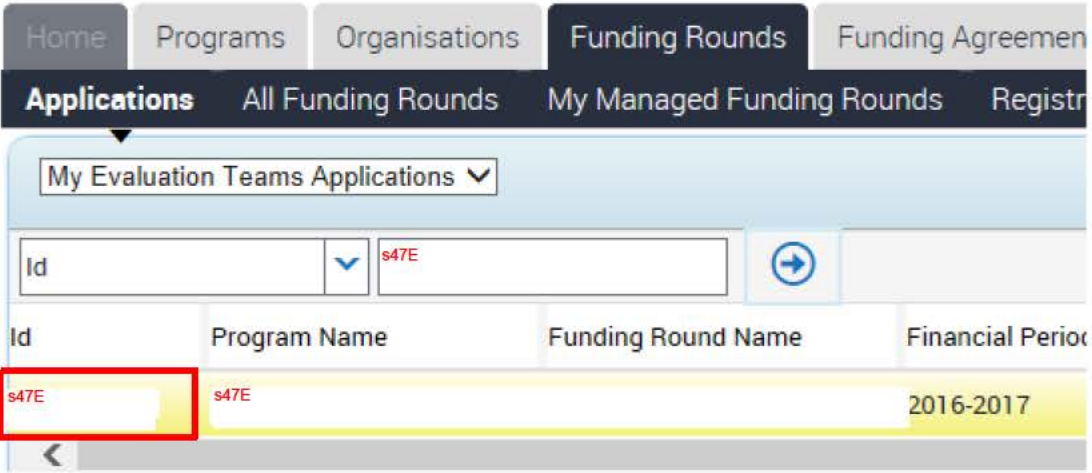
- Update Steps 1 and 20 with the appropriate ARC Folder Details
- Add or change steps as required to reflect funding round specific processes

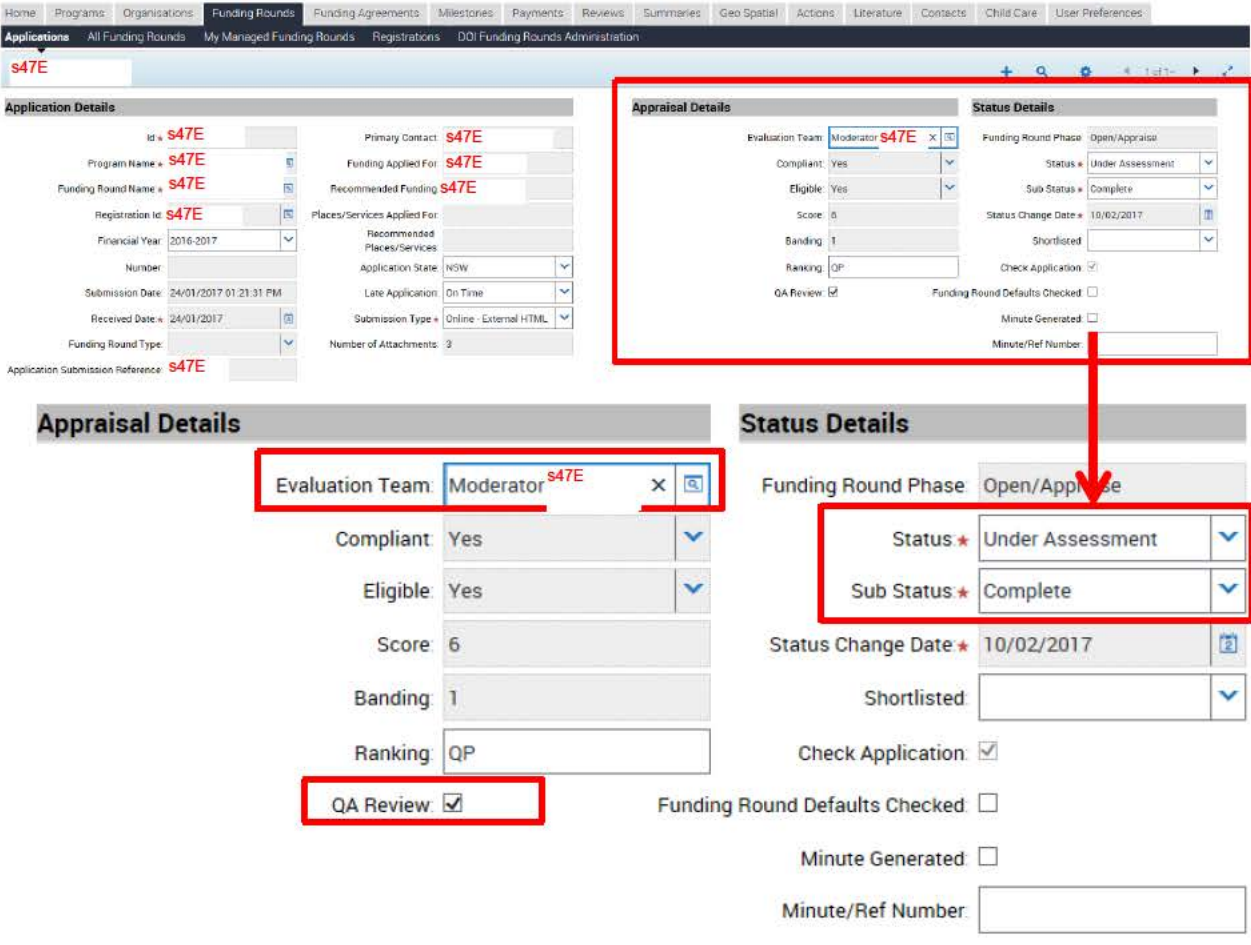
## Open the Assessment Tool and the Assessment Matrix

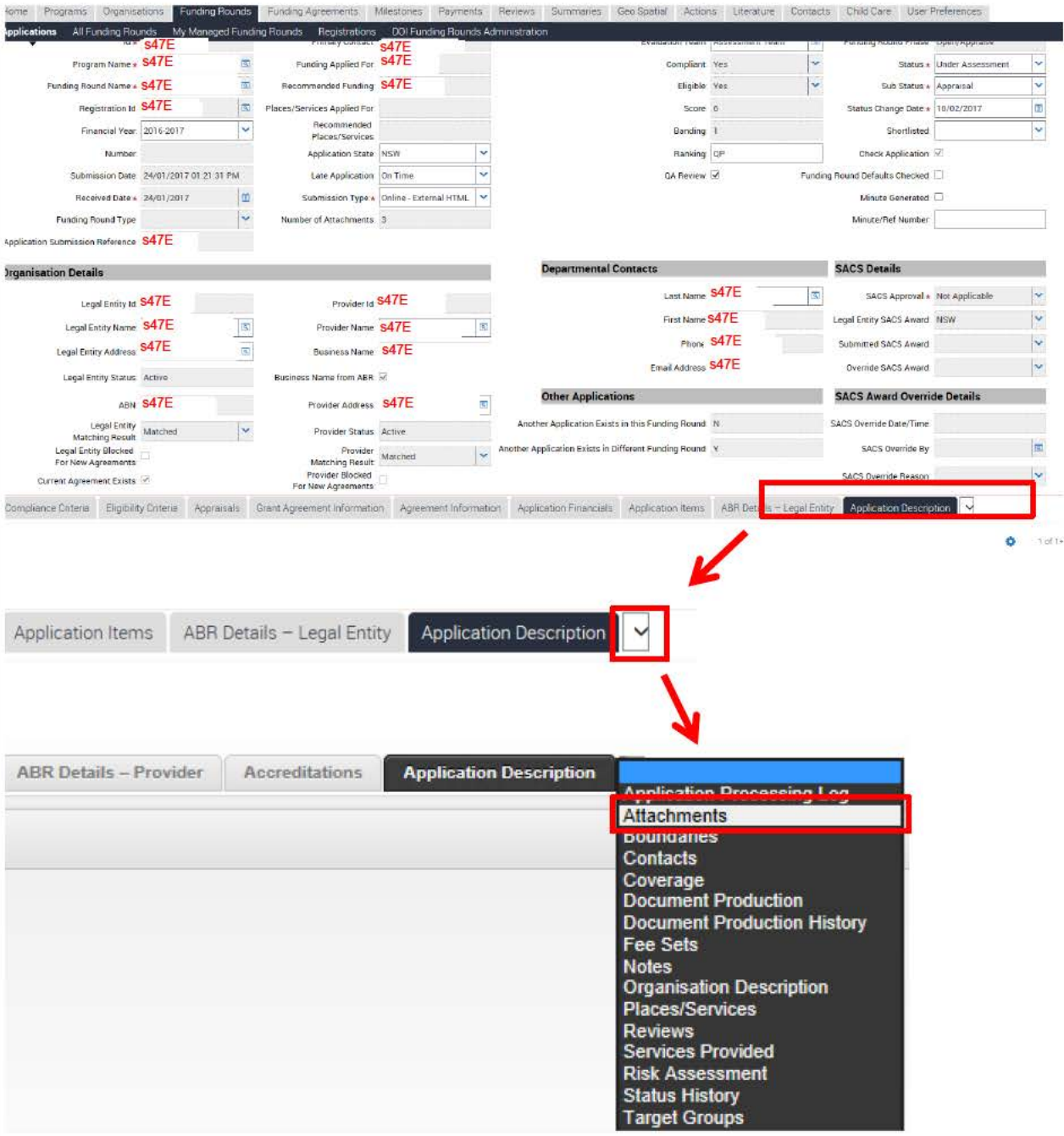
Steps	Actions
1	<p>Open <b>ARC</b> to access the completed Assessment Tool and the Assessment Matrix by clicking on <b>User Labels</b>.</p>  <p>The screenshot shows the HP Records Manager application window. The left sidebar contains several navigation options: Records, My Containers, Recent Documents, Saved Searches, and User Labels. The 'User Labels' option is highlighted with a red rectangular box. The main window area shows search results for 'Records' with columns for Record Number, Title (Free Text Part), and Date Created. The status bar at the bottom indicates the user is Christine GAFFNEY and the system is ED RMS-RMLA-00-PROO   PROO_ED RMS_WG.</p> <p>Double-click the appropriate Assessor folder.</p> <p><b>NOTE: If your User Labels are not set up, please speak with your Team Leader.</b></p>  <p>The second screenshot shows the HP Records Manager application window with the 'User Labels' search results displayed. The search results are listed in a table with columns for User Label Name and Owner. The results include: ADE Assessors, ADE Moderators, ADE DA Officers, and ADE Assessors. The status bar at the bottom indicates the user is Christine GAFFNEY and the system is ED RMS-RMLA-00-PROO   PROO_ED RMS_WG.</p>

Steps	Actions
	<p>Open the folder to access the Assessment Matrix and completed Assessment Tool.</p> <p><b>ARC Folder – EFXX/XXXXXX</b></p> 
2	Open <b>FOFMS</b> to access the Application Record.
3	<p>Click on the <b>Funding Rounds</b> tab.</p> <p>Click on the <b>Applications</b> link.</p> 

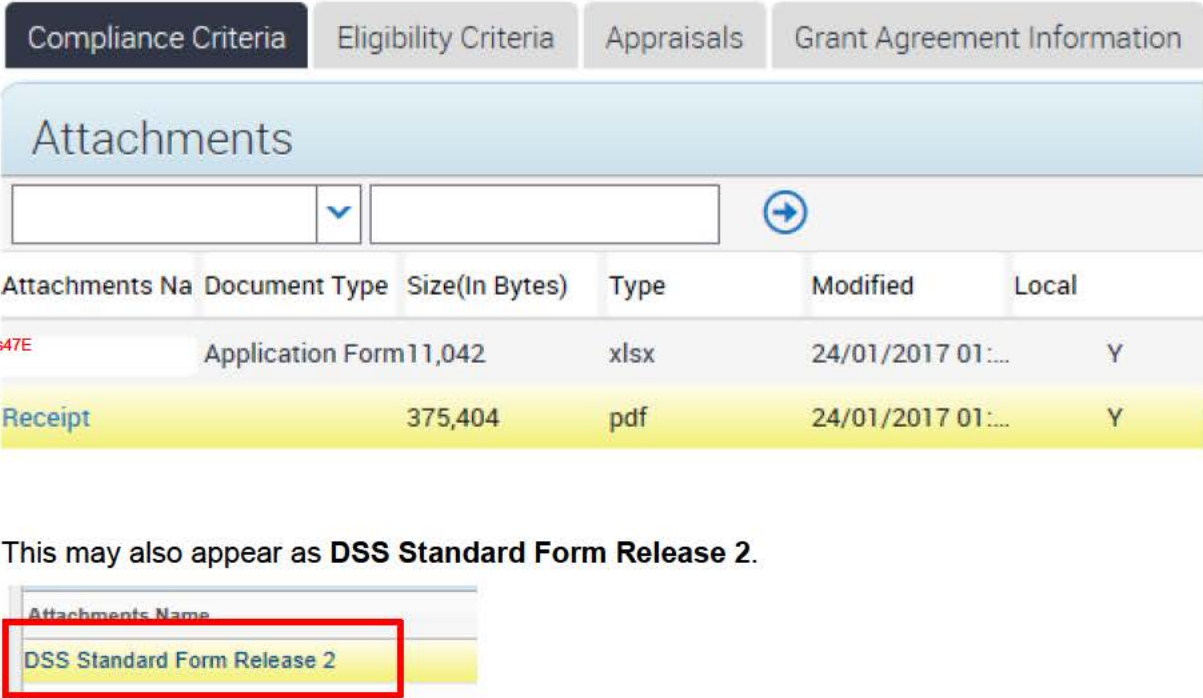
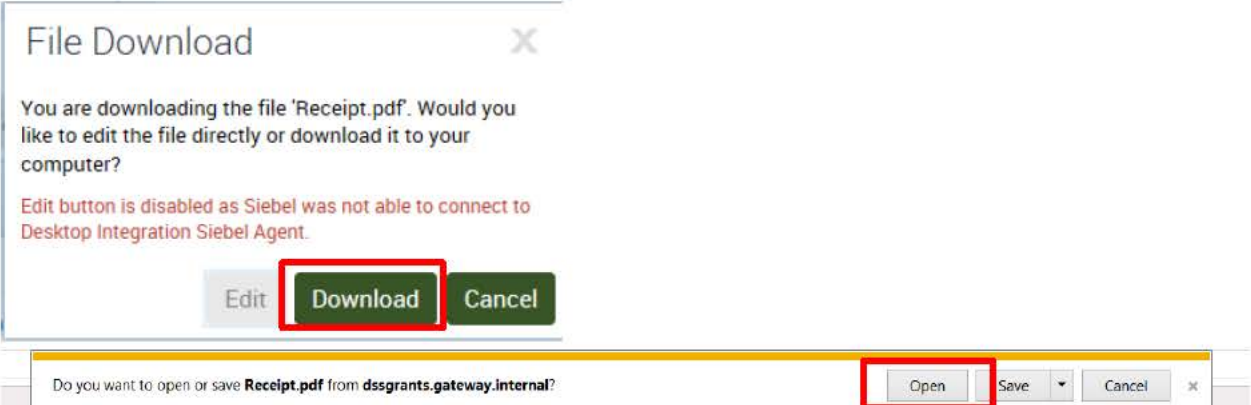
Steps	Actions
<p>4</p>	<p>Click on the drop down menu            Select <b>My Evaluation Team's Applications</b>.</p>  <p>The screenshot shows a navigation bar with tabs: Home, Programs, Organisations, Funding Rounds, and Funding Agreements. Below this is a sub-navigation bar with 'Applications', 'All Funding Rounds', and 'My Managed Funding Rounds'. A dropdown menu is open, showing 'My Entered Applications' with a red box around the dropdown arrow. A red arrow points to the second screenshot, which shows the dropdown menu with 'My Evaluation Teams Applications' selected and highlighted with a red box. Below the dropdown is a search bar and a table with columns: Id, Program Name, Funding Round, Financial Period, and Number. A row is highlighted in yellow with the value '2016-2017' in the Financial Period column.</p>
<p>5</p>	<p>Click on the drop down menu.            Select <b>Id</b>.</p>  <p>The screenshot shows the same interface as the previous step, but the dropdown menu is open, showing a list of options: 'Id', 'Program Name', 'Funding Round Name', and 'Financial Period'. The 'Id' option is highlighted with a red box. The search bar and table below are also visible, with the same yellow-highlighted row from the previous step.</p>

Steps	Actions
6	<p>Enter the <b>Application Id</b> in the next field. Click .</p>  <p>The screenshot shows a navigation menu with 'Applications' selected. Below it is a dropdown menu for 'My Evaluation Teams Applications'. A search field contains the text 's47E' and a search button with a right-pointing arrow is highlighted with a red box.</p>
7	<p>Click on the <b>hyperlink</b> in the <b>Id</b> column.</p>  <p>The screenshot shows the same interface as step 6, but now a table is visible. The table has columns for 'Id', 'Program Name', 'Funding Round Name', and 'Financial Period'. The first row of the table is highlighted in yellow, and the 'Id' cell of this row contains the text 's47E' and is highlighted with a red box.</p>

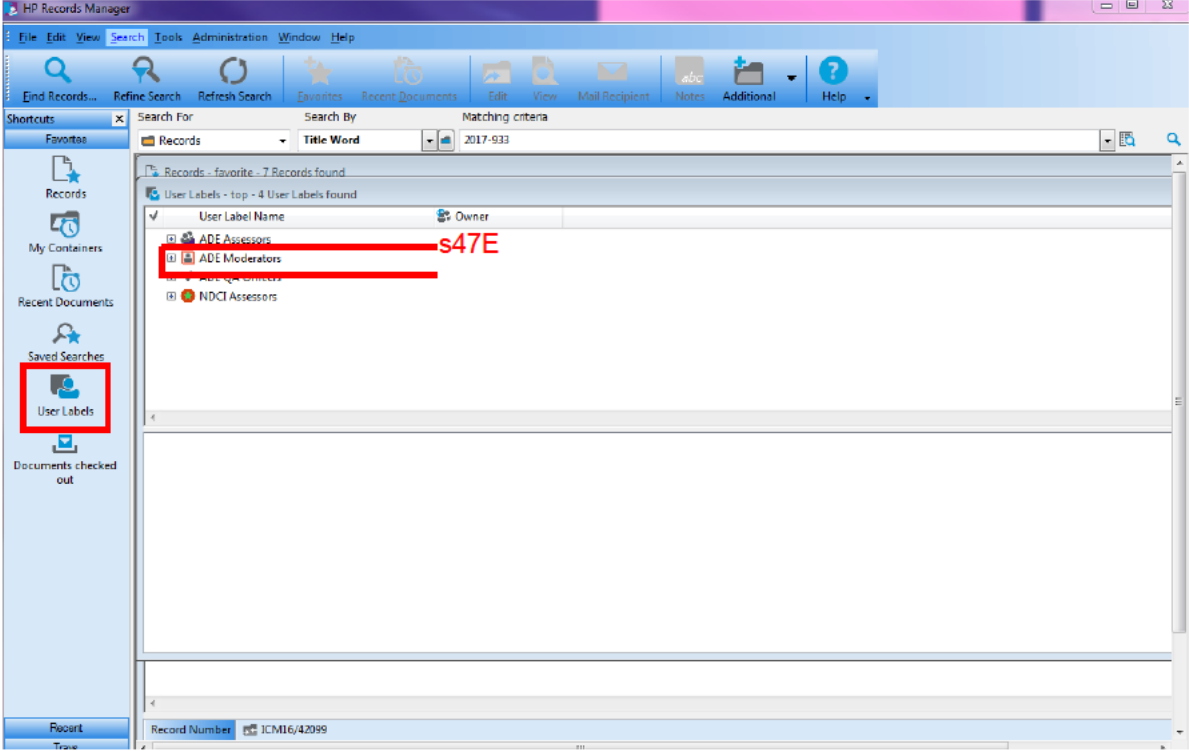
Steps	Actions
8	<p>A FOFMS application record will appear.</p> <p>Confirm that the Application Status is <b>Under Assessment</b> and Sub Status is <b>Complete</b></p> <ul style="list-style-type: none"> <li>If the QA Review process has already been completed, the QA Review flag should be checked</li> </ul> <p>Update the <b>Evaluation Team</b> field to your name.</p>  <p>The screenshot shows the application record for ID s47E. The 'Appraisal Details' section is highlighted with a red box. A red arrow points from this box to a zoomed-in view of the 'Appraisal Details' and 'Status Details' sections below. In the zoomed view, the 'Evaluation Team' is set to 'Moderator s47E', 'Status' is 'Under Assessment', 'Sub Status' is 'Complete', and the 'QA Review' checkbox is checked.</p>


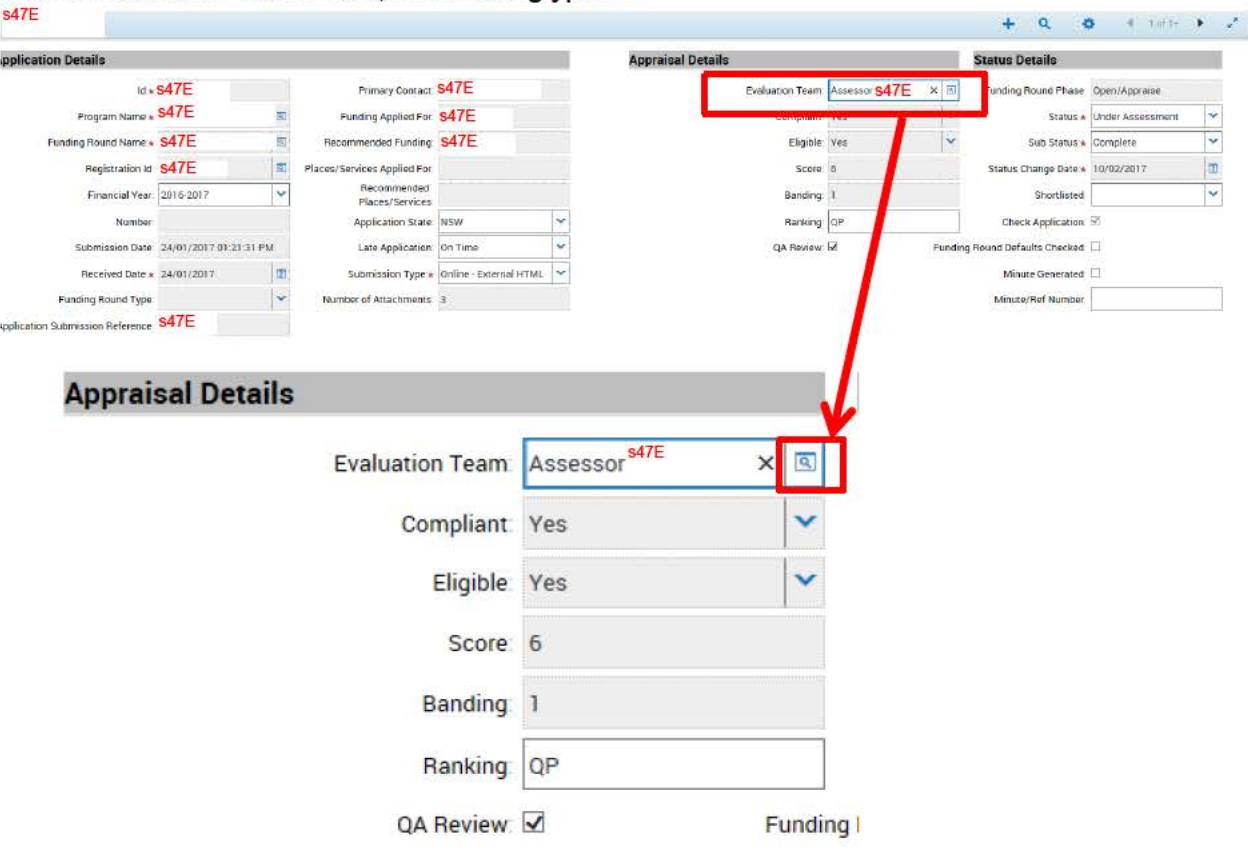
Steps	Actions
9	<p>Click on the <b>Attachments</b> tab.</p> <p><i>Note: If you cannot view the Attachments tab, select Attachments from the drop down list.</i></p>  <p>The screenshot shows a complex web interface with multiple tabs at the top: Home, Programs, Organisations, Funding Rounds, Funding Agreements, Milestones, Payments, Reviews, Summaries, Geo Spatial, Actions, Literature, Contacts, Child Care, and User Preferences. Below these are several sections: 'Program Details' (with fields for Program Name, Funding Round Name, Registration ID, etc.), 'Organisation Details' (with fields for Legal Entity Name, Address, etc.), 'Departmental Contacts' (with fields for Last Name, First Name, etc.), and 'SACS Details' (with fields for SACS Approval, etc.). A red box highlights the 'Application Description' tab in the top navigation bar. A red arrow points to a dropdown menu for this tab, which is also highlighted with a red box. The dropdown menu lists various options, with 'Attachments' highlighted by a red box. Other options include Boundaries, Contacts, Coverage, Document Production, Document Production History, Fee Sets, Notes, Organisation Description, Places/Services, Reviews, Services Provided, Risk Assessment, Status History, and Target Groups.</p>

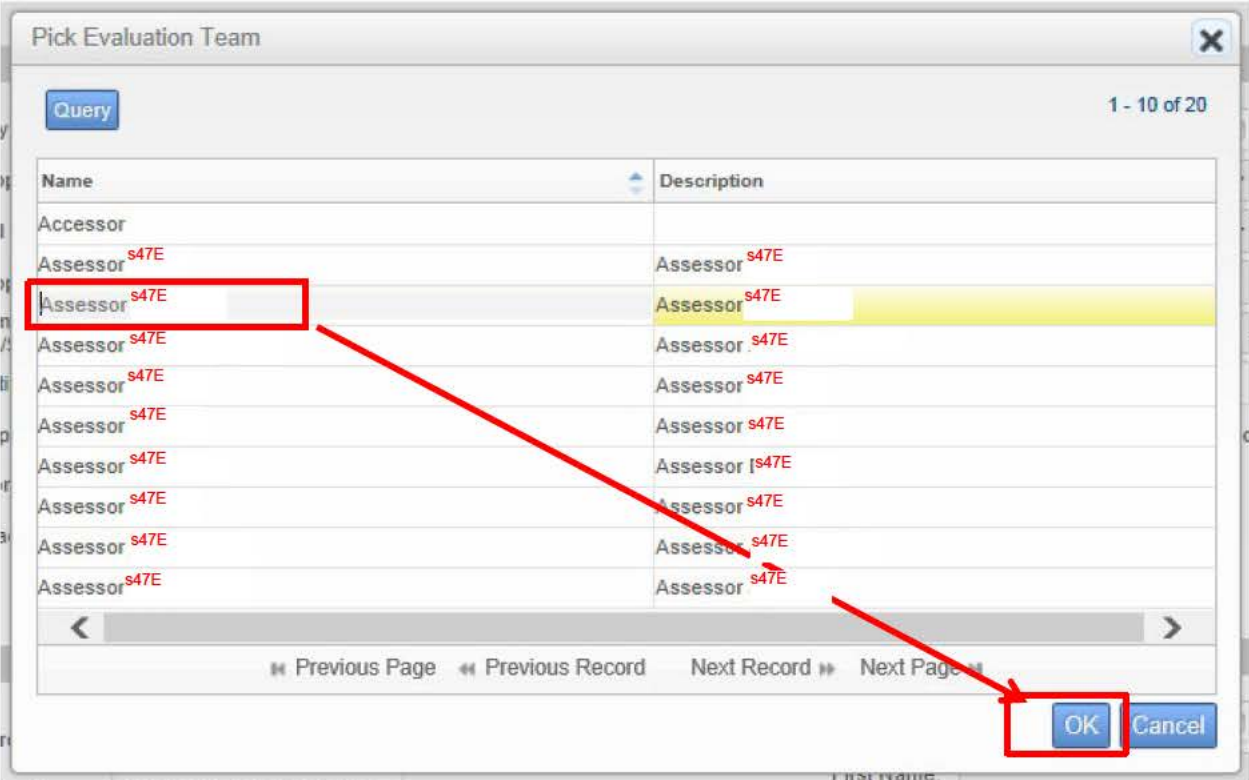


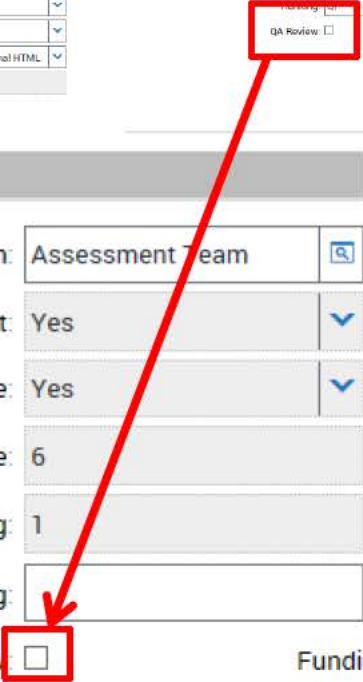
Steps	Actions
10	<p>Click on the <b>Receipt</b> hyperlink to open a copy of the Application Form.</p>  <p>This may also appear as <b>DSS Standard Form Release 2</b>.</p>
11	<p>If required, open other attachments by selecting the appropriate hyperlink.</p>
12	<p>The following box will open. Click <b>Download</b>, then <b>Open</b>.</p> 


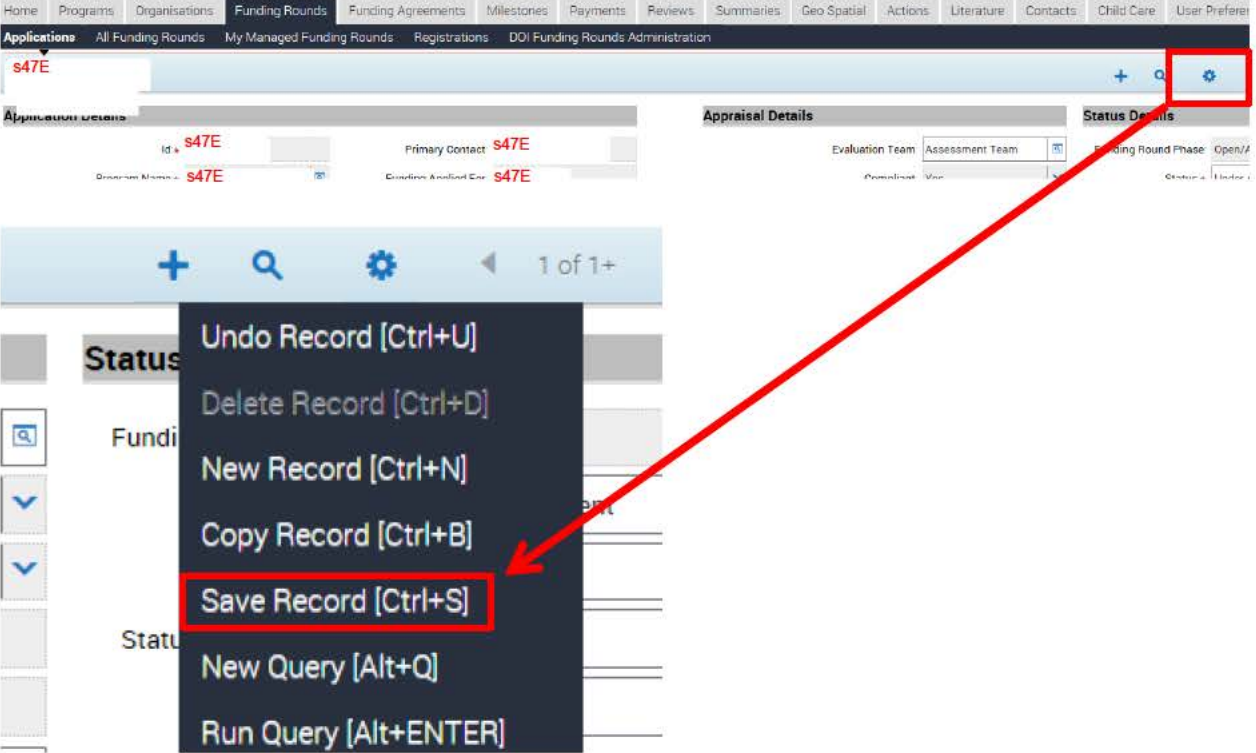
## Moderate the Assessment

Steps	Actions										
<p>13</p>	<p>Moderate the assessment by following the <b>Taskcard – Moderator Guide</b> and the <b>Moderator Workbook</b> located in your <b>User Labels</b> in ARC.</p> <p><b>NOTE: See Step 1 for how to access User Labels. If your User Labels are not set up, please speak with your Team Leader.</b></p>  <p>The screenshot shows the HP Records Manager interface. On the left sidebar, under 'Saved Searches', the 'User Labels' icon is highlighted with a red rectangular box. The main window displays a search results table with the following content:</p> <table border="1"> <thead> <tr> <th>User Label Name</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td>ADE Assessors</td> <td></td> </tr> <tr> <td><b>ADE Moderators</b></td> <td><b>s47E</b></td> </tr> <tr> <td>ADP Assessors</td> <td></td> </tr> <tr> <td>NDCI Assessors</td> <td></td> </tr> </tbody> </table>	User Label Name	Owner	ADE Assessors		<b>ADE Moderators</b>	<b>s47E</b>	ADP Assessors		NDCI Assessors	
User Label Name	Owner										
ADE Assessors											
<b>ADE Moderators</b>	<b>s47E</b>										
ADP Assessors											
NDCI Assessors											
<p>14</p>	<ul style="list-style-type: none"> <li>• If you <b>AGREE</b> with the assessment go to step 20.</li> <li>• If you <b>DO NOT AGREE</b> with the assessment go to step 15.</li> </ul>										

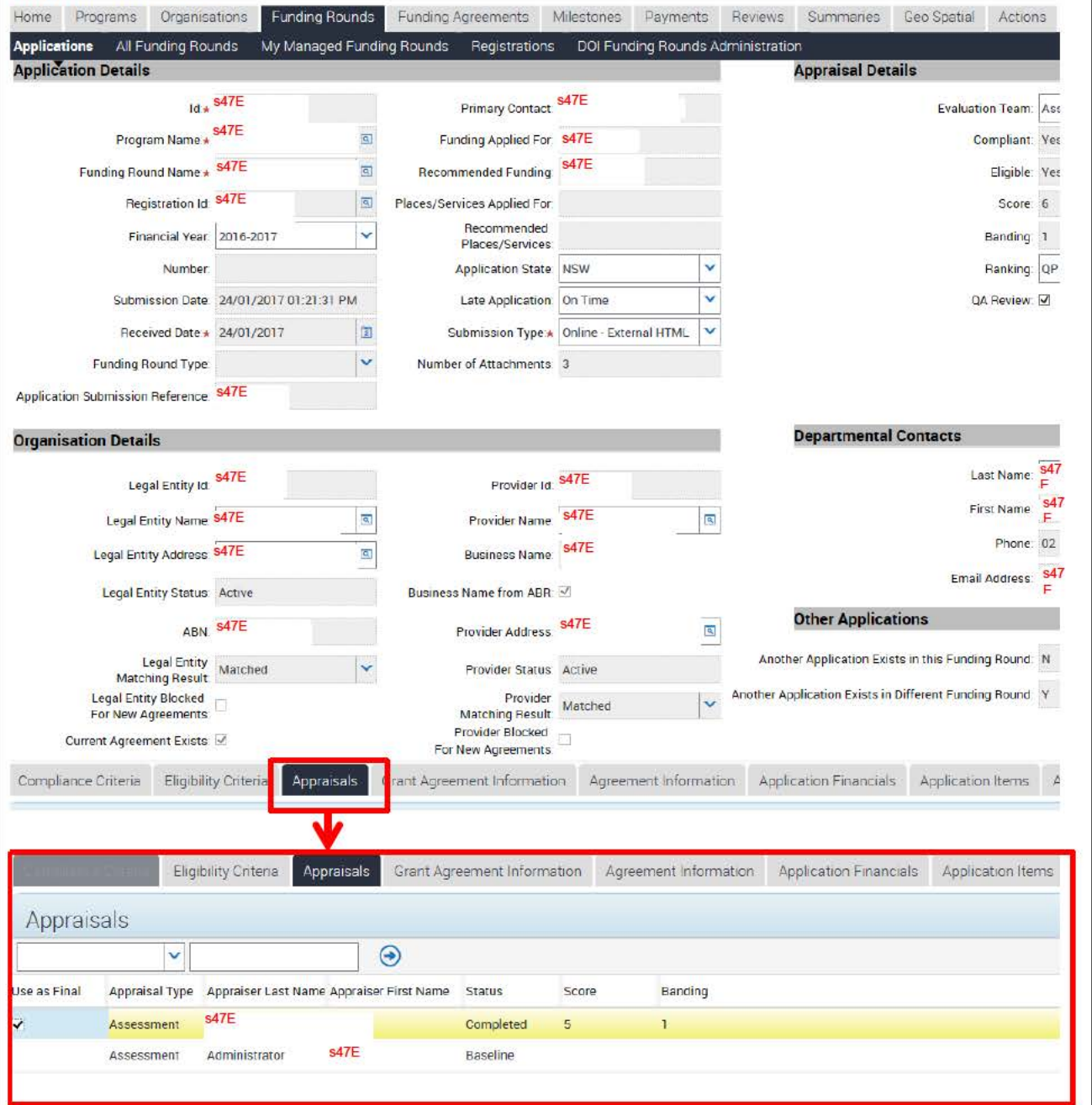
Steps	Actions
15	<p>In the Evaluation Team field, select the glyph </p>  <p>The screenshot shows a web interface with three main sections: Application Details, Appraisal Details, and Status Details. The 'Appraisal Details' section is expanded, showing the 'Evaluation Team' field set to 'Assessor s47E'. A red box highlights the 'Assessor s47E' text and the glyph icon to its right. A red arrow points from the 'Assessor s47E' text in the top 'Appraisal Details' section to the glyph icon in the bottom 'Appraisal Details' section.</p> <p><b>Application Details</b></p> <ul style="list-style-type: none"> <li>Id: s47E</li> <li>Program Name: s47E</li> <li>Funding Round Name: s47E</li> <li>Registration Id: s47E</li> <li>Financial Year: 2016-2017</li> <li>Submission Date: 24/01/2017 01:21:31 PM</li> <li>Received Date: 24/01/2017</li> <li>Funding Round Type: s47E</li> </ul> <p><b>Appraisal Details</b></p> <ul style="list-style-type: none"> <li>Evaluation Team: Assessor s47E</li> <li>Compliant: Yes</li> <li>Eligible: Yes</li> <li>Score: 6</li> <li>Banding: 1</li> <li>Ranking: QP</li> <li>QA Review: <input checked="" type="checkbox"/></li> </ul> <p><b>Status Details</b></p> <ul style="list-style-type: none"> <li>Funding Round Phase: Open/Appraise</li> <li>Status: Under Assessment</li> <li>Sub Status: Complete</li> <li>Status Change Date: 10/02/2017</li> <li>Shortlisted: <input type="checkbox"/></li> <li>Check Application: <input checked="" type="checkbox"/></li> <li>Funding Round Defaults Checked: <input type="checkbox"/></li> <li>Minute Generated: <input type="checkbox"/></li> <li>Minute/Ref Number: <input type="text"/></li> </ul>

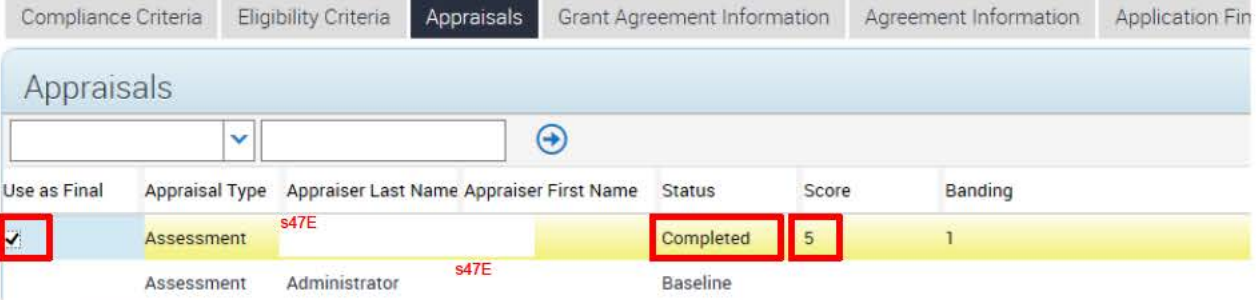

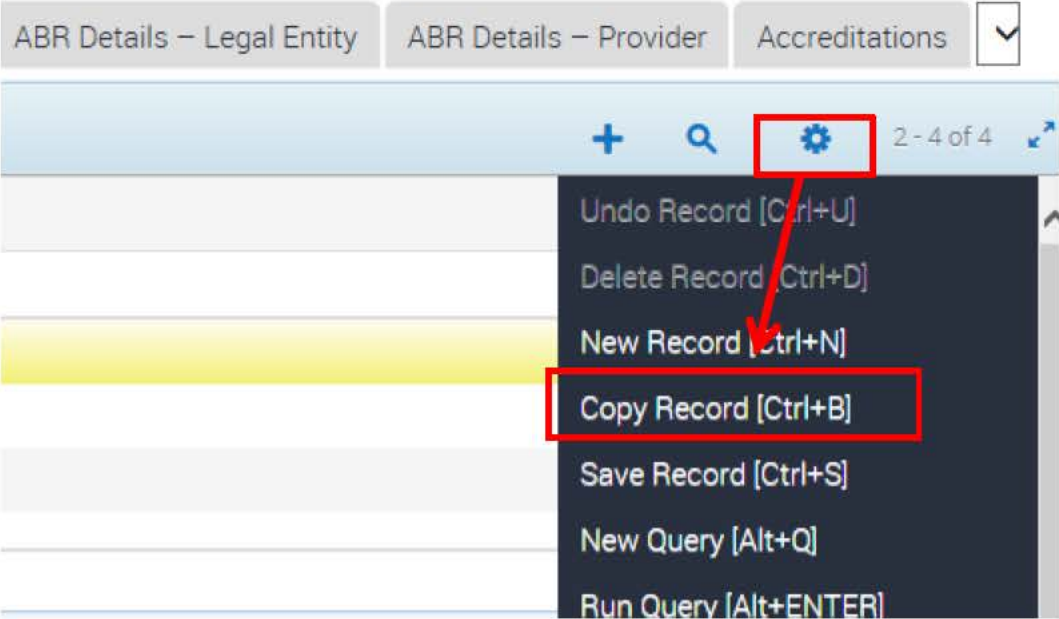
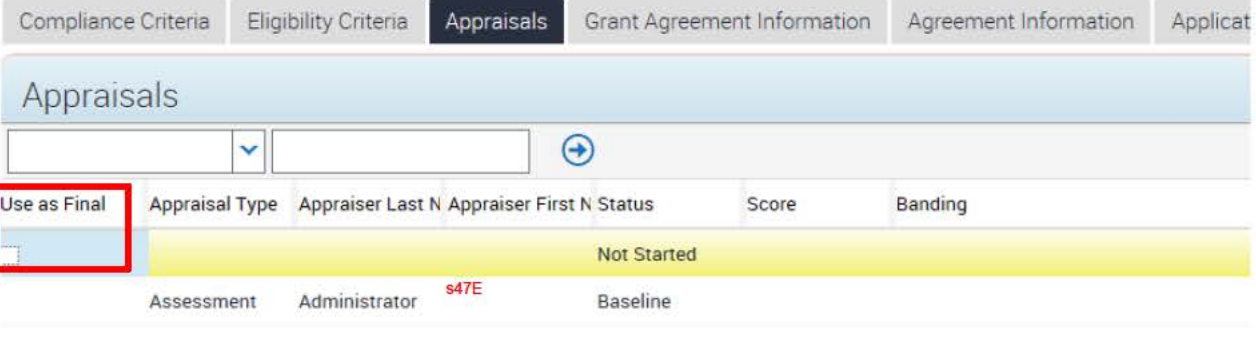
Steps	Actions																								
16	<p>A list of the available Moderators and Assessors will be displayed. Highlight the appropriate <b>Assessor</b> and select <b>OK</b>.</p> <p><i>Note:</i></p> <ul style="list-style-type: none"><li>- A partial re-assessment can be completed by the same assessor who conducted the original assessment.</li><li>- A full re-assessment will be completed by a different assessor.</li></ul>  <p>The screenshot shows a window titled "Pick Evaluation Team" with a "Query" button and "1 - 10 of 20" records. The table below is as follows:</p> <table border="1"><thead><tr><th>Name</th><th>Description</th></tr></thead><tbody><tr><td>Assessor</td><td></td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr><tr><td>Assessor s47E</td><td>Assessor s47E</td></tr></tbody></table> <p>Navigation buttons at the bottom include: Previous Page, Previous Record, Next Record, Next Page, OK, and Cancel.</p>	Name	Description	Assessor		Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E	Assessor s47E
Name	Description																								
Assessor																									
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								
Assessor s47E	Assessor s47E																								

Steps	Actions																				
17	<p data-bbox="228 320 587 353">Un-tick the QA review box.</p> <div data-bbox="228 365 1485 705"><p data-bbox="228 365 1485 398">s47E</p><table border="1"><thead><tr><th data-bbox="228 409 805 432">Application Details</th><th data-bbox="805 409 1204 432">Appraisal Details</th><th data-bbox="1204 409 1485 432">Status Details</th></tr></thead><tbody><tr><td data-bbox="228 432 805 705"><p data-bbox="228 432 805 454">Id: s47E</p><p data-bbox="228 454 805 477">Program Name: s47E</p><p data-bbox="228 477 805 499">Funding Round Name: s47E</p><p data-bbox="228 499 805 521">Registration Id: s47E</p><p data-bbox="228 521 805 544">Financial Year: 2016-2017</p><p data-bbox="228 544 805 566">Number: [ ]</p><p data-bbox="228 566 805 589">Submission Date: 24/01/2017 01:21:31 PM</p><p data-bbox="228 589 805 611">Received Date: 24/01/2017</p><p data-bbox="228 611 805 633">Funding Round Type: [ ]</p><p data-bbox="228 633 805 656">Application Submission Reference: s47E</p></td><td data-bbox="805 432 1204 705"><p data-bbox="805 432 1204 454">Primary Contact: s47E</p><p data-bbox="805 454 1204 477">Funding Applied For: s47E</p><p data-bbox="805 477 1204 499">Recommended Funding: s47E</p><p data-bbox="805 499 1204 521">Places/Services Applied For: [ ]</p><p data-bbox="805 521 1204 544">Recommended Places/Services: [ ]</p><p data-bbox="805 544 1204 566">Application State: NSW</p><p data-bbox="805 566 1204 589">Late Application: On Time</p><p data-bbox="805 589 1204 611">Submission Type: Online - External HTML</p><p data-bbox="805 611 1204 633">Number of Attachments: 3</p><p data-bbox="805 633 1204 656">Evaluation Team: Assessment Team</p><p data-bbox="805 656 1204 678">Compliant: Yes</p><p data-bbox="805 678 1204 701">Eligible: Yes</p><p data-bbox="805 701 1204 723">Score: 6</p><p data-bbox="805 723 1204 745">Banding: 1</p><p data-bbox="805 745 1204 768">Ranking: [ ]</p><p data-bbox="805 768 1204 790">QA Review: <input type="checkbox"/></p></td><td data-bbox="1204 432 1485 705"><p data-bbox="1204 432 1485 454">Funding Round Phase: Open/Appraise</p><p data-bbox="1204 454 1485 477">Status: Under Assessment</p><p data-bbox="1204 477 1485 499">Sub Status: Complete</p><p data-bbox="1204 499 1485 521">Status Change Date: 16/02/2017</p><p data-bbox="1204 521 1485 544">Shortlisted: [ ]</p><p data-bbox="1204 544 1485 566">Check Application: <input checked="" type="checkbox"/></p><p data-bbox="1204 566 1485 589">Funding Round Defaults Checked: <input type="checkbox"/></p><p data-bbox="1204 589 1485 611">Minute Generated: <input type="checkbox"/></p><p data-bbox="1204 611 1485 633">Minute/Ref Number: [ ]</p></td></tr></tbody></table></div> <p data-bbox="228 728 507 772"><b>Appraisal Details</b></p> <table border="1"><tbody><tr><td data-bbox="547 801 1102 853">Evaluation Team:</td><td data-bbox="762 801 1102 853">Assessment Team</td></tr><tr><td data-bbox="619 880 1102 931">Compliant:</td><td data-bbox="762 880 1102 931">Yes</td></tr><tr><td data-bbox="655 947 1102 999">Eligible:</td><td data-bbox="762 947 1102 999">Yes</td></tr><tr><td data-bbox="675 1014 1102 1066">Score:</td><td data-bbox="762 1014 1102 1066">6</td></tr><tr><td data-bbox="643 1081 1102 1133">Banding:</td><td data-bbox="762 1081 1102 1133">1</td></tr><tr><td data-bbox="643 1149 1102 1200">Ranking:</td><td data-bbox="762 1149 1102 1200">[ ]</td></tr><tr><td data-bbox="619 1216 1102 1267">QA Review:</td><td data-bbox="762 1216 1102 1267"><input type="checkbox"/></td></tr></tbody></table> <p data-bbox="1034 1216 1134 1267">Funding</p> 	Application Details	Appraisal Details	Status Details	<p data-bbox="228 432 805 454">Id: s47E</p> <p data-bbox="228 454 805 477">Program Name: s47E</p> <p data-bbox="228 477 805 499">Funding Round Name: s47E</p> <p data-bbox="228 499 805 521">Registration Id: s47E</p> <p data-bbox="228 521 805 544">Financial Year: 2016-2017</p> <p data-bbox="228 544 805 566">Number: [ ]</p> <p data-bbox="228 566 805 589">Submission Date: 24/01/2017 01:21:31 PM</p> <p data-bbox="228 589 805 611">Received Date: 24/01/2017</p> <p data-bbox="228 611 805 633">Funding Round Type: [ ]</p> <p data-bbox="228 633 805 656">Application Submission Reference: s47E</p>	<p data-bbox="805 432 1204 454">Primary Contact: s47E</p> <p data-bbox="805 454 1204 477">Funding Applied For: s47E</p> <p data-bbox="805 477 1204 499">Recommended Funding: s47E</p> <p data-bbox="805 499 1204 521">Places/Services Applied For: [ ]</p> <p data-bbox="805 521 1204 544">Recommended Places/Services: [ ]</p> <p data-bbox="805 544 1204 566">Application State: NSW</p> <p data-bbox="805 566 1204 589">Late Application: On Time</p> <p data-bbox="805 589 1204 611">Submission Type: Online - External HTML</p> <p data-bbox="805 611 1204 633">Number of Attachments: 3</p> <p data-bbox="805 633 1204 656">Evaluation Team: Assessment Team</p> <p data-bbox="805 656 1204 678">Compliant: Yes</p> <p data-bbox="805 678 1204 701">Eligible: Yes</p> <p data-bbox="805 701 1204 723">Score: 6</p> <p data-bbox="805 723 1204 745">Banding: 1</p> <p data-bbox="805 745 1204 768">Ranking: [ ]</p> <p data-bbox="805 768 1204 790">QA Review: <input type="checkbox"/></p>	<p data-bbox="1204 432 1485 454">Funding Round Phase: Open/Appraise</p> <p data-bbox="1204 454 1485 477">Status: Under Assessment</p> <p data-bbox="1204 477 1485 499">Sub Status: Complete</p> <p data-bbox="1204 499 1485 521">Status Change Date: 16/02/2017</p> <p data-bbox="1204 521 1485 544">Shortlisted: [ ]</p> <p data-bbox="1204 544 1485 566">Check Application: <input checked="" type="checkbox"/></p> <p data-bbox="1204 566 1485 589">Funding Round Defaults Checked: <input type="checkbox"/></p> <p data-bbox="1204 589 1485 611">Minute Generated: <input type="checkbox"/></p> <p data-bbox="1204 611 1485 633">Minute/Ref Number: [ ]</p>	Evaluation Team:	Assessment Team	Compliant:	Yes	Eligible:	Yes	Score:	6	Banding:	1	Ranking:	[ ]	QA Review:	<input type="checkbox"/>
Application Details	Appraisal Details	Status Details																			
<p data-bbox="228 432 805 454">Id: s47E</p> <p data-bbox="228 454 805 477">Program Name: s47E</p> <p data-bbox="228 477 805 499">Funding Round Name: s47E</p> <p data-bbox="228 499 805 521">Registration Id: s47E</p> <p data-bbox="228 521 805 544">Financial Year: 2016-2017</p> <p data-bbox="228 544 805 566">Number: [ ]</p> <p data-bbox="228 566 805 589">Submission Date: 24/01/2017 01:21:31 PM</p> <p data-bbox="228 589 805 611">Received Date: 24/01/2017</p> <p data-bbox="228 611 805 633">Funding Round Type: [ ]</p> <p data-bbox="228 633 805 656">Application Submission Reference: s47E</p>	<p data-bbox="805 432 1204 454">Primary Contact: s47E</p> <p data-bbox="805 454 1204 477">Funding Applied For: s47E</p> <p data-bbox="805 477 1204 499">Recommended Funding: s47E</p> <p data-bbox="805 499 1204 521">Places/Services Applied For: [ ]</p> <p data-bbox="805 521 1204 544">Recommended Places/Services: [ ]</p> <p data-bbox="805 544 1204 566">Application State: NSW</p> <p data-bbox="805 566 1204 589">Late Application: On Time</p> <p data-bbox="805 589 1204 611">Submission Type: Online - External HTML</p> <p data-bbox="805 611 1204 633">Number of Attachments: 3</p> <p data-bbox="805 633 1204 656">Evaluation Team: Assessment Team</p> <p data-bbox="805 656 1204 678">Compliant: Yes</p> <p data-bbox="805 678 1204 701">Eligible: Yes</p> <p data-bbox="805 701 1204 723">Score: 6</p> <p data-bbox="805 723 1204 745">Banding: 1</p> <p data-bbox="805 745 1204 768">Ranking: [ ]</p> <p data-bbox="805 768 1204 790">QA Review: <input type="checkbox"/></p>	<p data-bbox="1204 432 1485 454">Funding Round Phase: Open/Appraise</p> <p data-bbox="1204 454 1485 477">Status: Under Assessment</p> <p data-bbox="1204 477 1485 499">Sub Status: Complete</p> <p data-bbox="1204 499 1485 521">Status Change Date: 16/02/2017</p> <p data-bbox="1204 521 1485 544">Shortlisted: [ ]</p> <p data-bbox="1204 544 1485 566">Check Application: <input checked="" type="checkbox"/></p> <p data-bbox="1204 566 1485 589">Funding Round Defaults Checked: <input type="checkbox"/></p> <p data-bbox="1204 589 1485 611">Minute Generated: <input type="checkbox"/></p> <p data-bbox="1204 611 1485 633">Minute/Ref Number: [ ]</p>																			
Evaluation Team:	Assessment Team																				
Compliant:	Yes																				
Eligible:	Yes																				
Score:	6																				
Banding:	1																				
Ranking:	[ ]																				
QA Review:	<input type="checkbox"/>																				

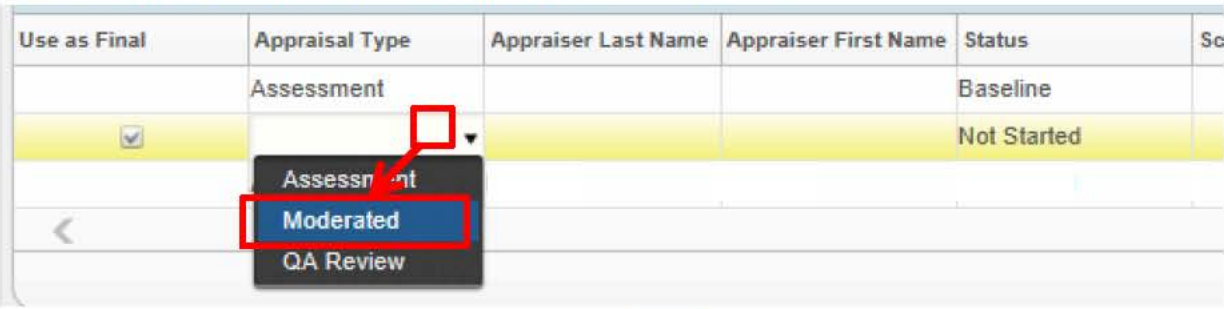

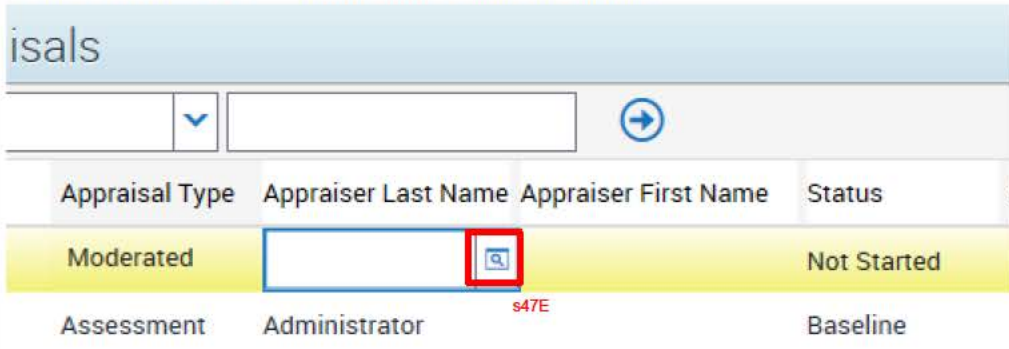
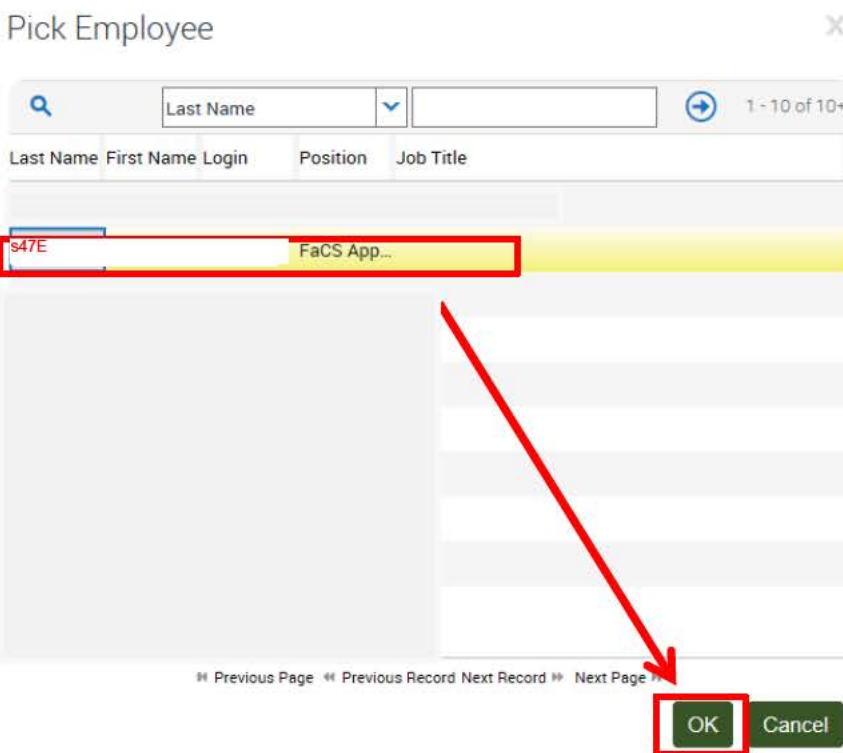
Steps	Actions
18	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>  <p>The screenshot shows a web application interface with a top navigation bar containing 'Home', 'Programs', 'Organisations', 'Funding Rounds', 'Funding Agreements', 'Milestones', 'Payments', 'Reviews', 'Summaries', 'Geo Spatial', 'Actions', 'Literature', 'Contacts', 'Child Care', and 'User Preferences'. Below this is a sub-navigation bar with 'Applications', 'All Funding Rounds', 'My Managed Funding Rounds', 'Registrations', and 'DOI Funding Rounds Administration'. The main content area displays application details for 's47E', including 'Application Details', 'Appraisal Details', and 'Status Details'. A dropdown menu is open, listing actions: 'Undo Record [Ctrl+U]', 'Delete Record [Ctrl+D]', 'New Record [Ctrl+N]', 'Copy Record [Ctrl+B]', 'Save Record [Ctrl+S]', 'New Query [Alt+Q]', and 'Run Query [Alt+ENTER]'. The 'Save Record [Ctrl+S]' option is highlighted with a red box. A red arrow points from the gear icon in the top right corner of the application to the 'Save Record' option in the dropdown menu.</p>
19	<p>If a partial re-assessment is required:</p> <ul style="list-style-type: none"> <li>• Open and complete the <b>Moderator – Partial Re-assessment</b> email template to notify the original assessor that the assessment is ready for partial re-assessment.</li> <li>• The Assessor should follow the steps in the <b>FOFMS Task Card – Partial Re-assessment</b>.</li> </ul> <p>If a full re-assessment is required:</p> <ul style="list-style-type: none"> <li>• Open and complete the <b>Moderator – Full Re-assessment</b> email template to notify the new assessor that the assessment is ready for a full re-assessment.</li> <li>• The Assessor should follow the steps in the <b>FOFMS Task Card - Full Re-assessment</b>.</li> </ul> <p>For email templates refer to:  <b>ARC Folder – EF16/392360 – D16/7538081</b></p>
20	<p>Open the <b>Moderator Workbook</b> located in your <b>User Labels</b> in <b>ARC</b>.  <b>ARC Folder – EFXX/XXXXXX</b></p> <p><b>NOTE: See Step 1 for how to access User Labels. If your User Labels are not set up, please speak with your Team Leader.</b></p> <p>Update the Moderator Workbook.    Close all documents in ARC.</p>
21	<p>Once a full re-assessment and QA or partial re-assessment and QA have been completed, the re-assessment will need to be moderated again.</p>

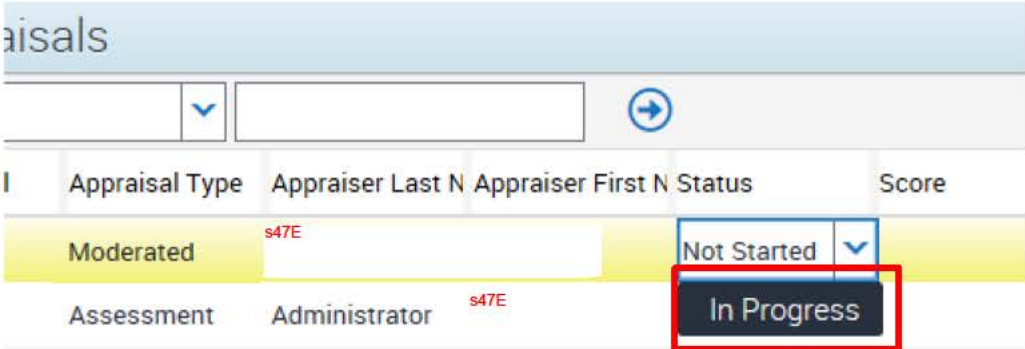

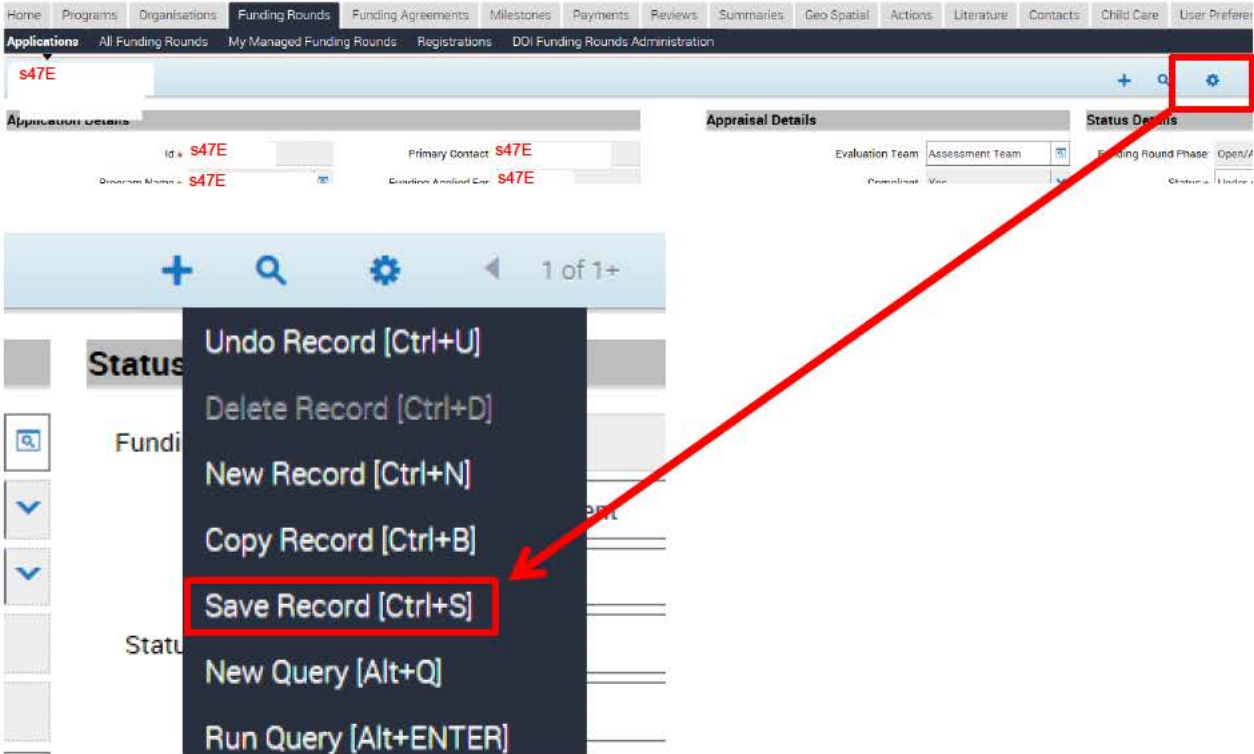
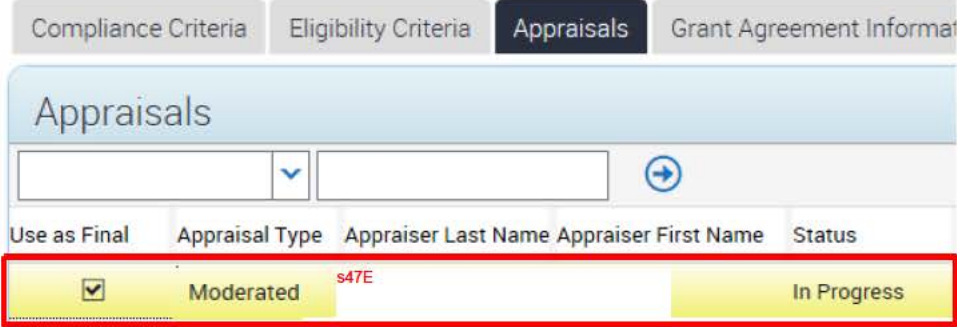
## Finalise the Moderation in FOFMS

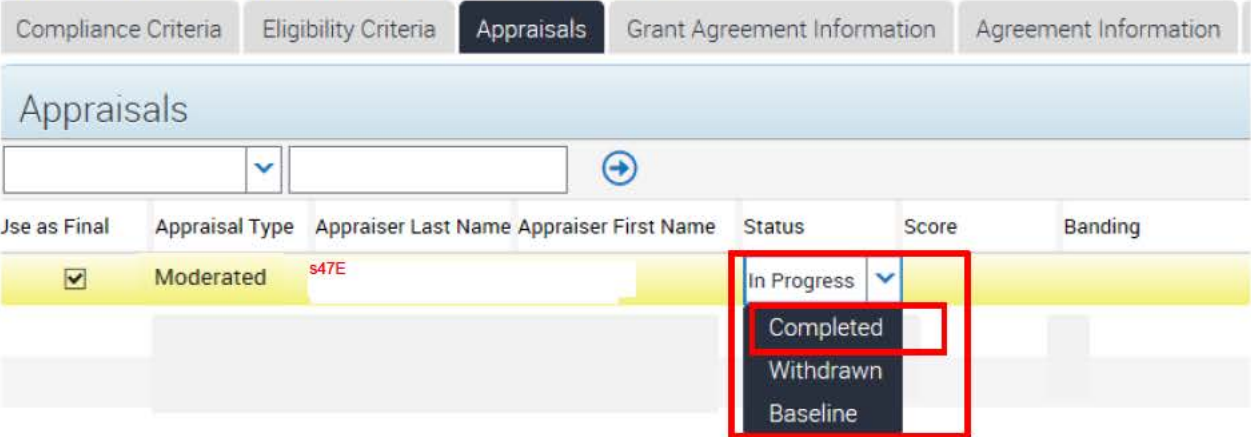

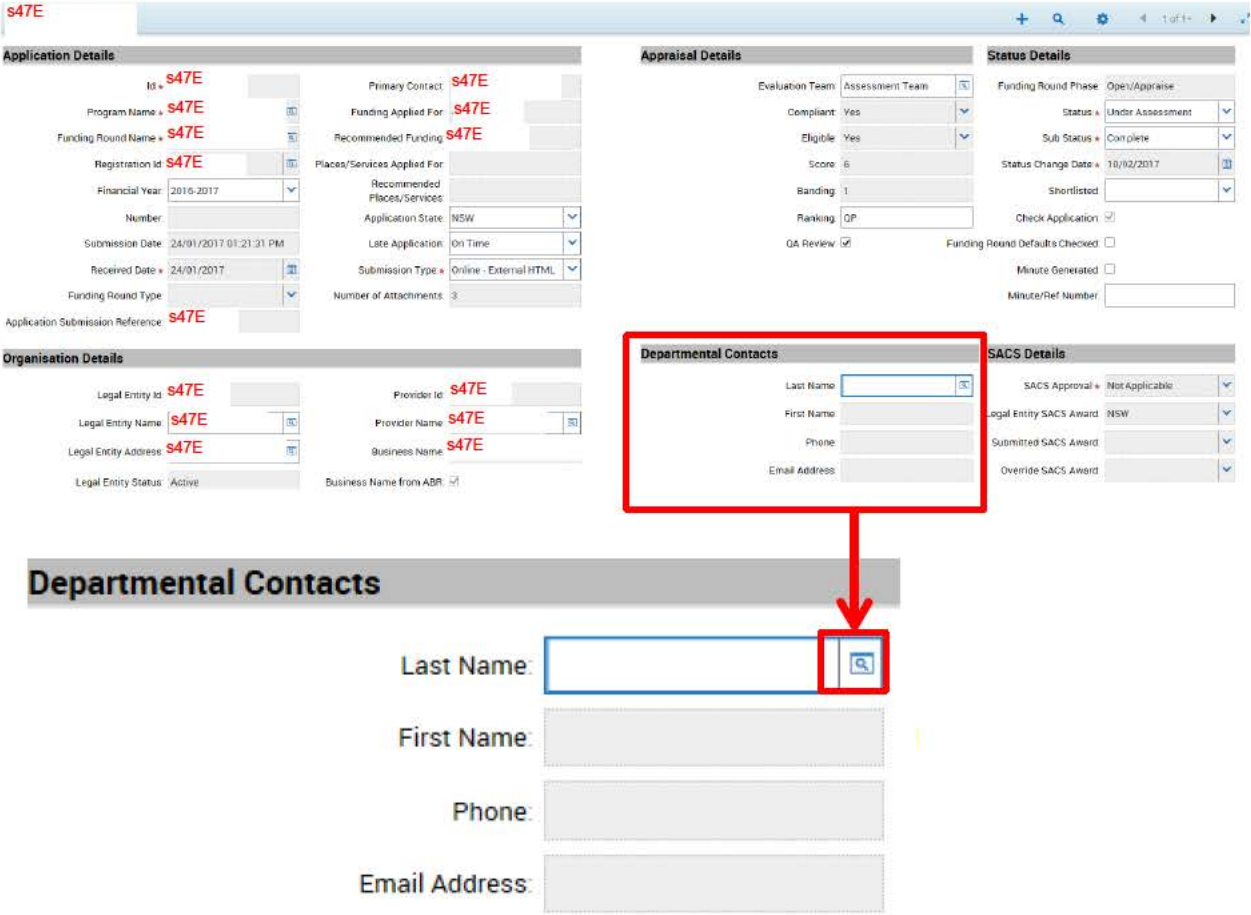


Steps	Actions																					
22	<p>Once the Moderation process is complete, click on the <b>Appraisals</b> tab and scroll down to the <b>Appraisal records.</b></p>  <p>The screenshot shows the 'Application Details' page for a funding round. The 'Appraisals' tab is selected in the top navigation bar. Below the navigation bar, there are sections for 'Application Details', 'Organisation Details', 'Departmental Contacts', and 'Other Applications'. The 'Appraisals' sub-tab is highlighted with a red box, and a red arrow points to it. Below this, the 'Appraisals' table is shown with one record highlighted in yellow.</p> <table border="1" data-bbox="209 1568 1513 1814"> <thead> <tr> <th>Use as Final</th> <th>Appraisal Type</th> <th>Appraiser Last Name</th> <th>Appraiser First Name</th> <th>Status</th> <th>Score</th> <th>Banding</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Assessment</td> <td>s47E</td> <td></td> <td>Completed</td> <td>5</td> <td>1</td> </tr> <tr> <td></td> <td>Assessment</td> <td>Administrator</td> <td>s47E</td> <td>Baseline</td> <td></td> <td></td> </tr> </tbody> </table>	Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	Score	Banding	<input checked="" type="checkbox"/>	Assessment	s47E		Completed	5	1		Assessment	Administrator	s47E	Baseline		
Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	Score	Banding																
<input checked="" type="checkbox"/>	Assessment	s47E		Completed	5	1																
	Assessment	Administrator	s47E	Baseline																		

Steps	Actions
23	<p>Highlight the appraisal record ticked <b>Use as Final</b>.            Ensure the Status is <b>Completed</b> and a <b>Score</b> has populated.</p>  <p>The screenshot shows a web interface with tabs for 'Compliance Criteria', 'Eligibility Criteria', 'Appraisals', 'Grant Agreement Information', 'Agreement Information', and 'Application Fin'. Below the tabs is a search bar and a table titled 'Appraisals'. The table has columns: 'Use as Final', 'Appraisal Type', 'Appraiser Last Name', 'Appraiser First Name', 'Status', 'Score', and 'Banding'. A row is highlighted in yellow with the following values: 'Use as Final' (checked), 'Assessment', 's47E', 'Assessment', 'Administrator', 'Completed', '5', and '1'.</p>
24	<p>Click  and select <b>Copy Record</b>.</p>  <p>The screenshot shows a web interface with tabs for 'ABR Details - Legal Entity', 'ABR Details - Provider', and 'Accreditations'. Below the tabs is a search bar and a table. A context menu is open over a record, listing actions: 'Undo Record [Ctrl+U]', 'Delete Record [Ctrl+D]', 'New Record [Ctrl+N]', 'Copy Record [Ctrl+B]', 'Save Record [Ctrl+S]', 'New Query [Alt+Q]', and 'Run Query [Alt+ENTER]'. The 'Copy Record [Ctrl+B]' option is highlighted with a red box.</p>
25	<p>A new assessment line will appear.            Tick <b>Use as Final</b>.</p>  <p>The screenshot shows the same 'Appraisals' table as in step 23. A new row is highlighted in yellow with the following values: 'Use as Final' (checked), 'Assessment', 'Administrator', 's47E', 'Not Started', and 'Baseline'.</p>


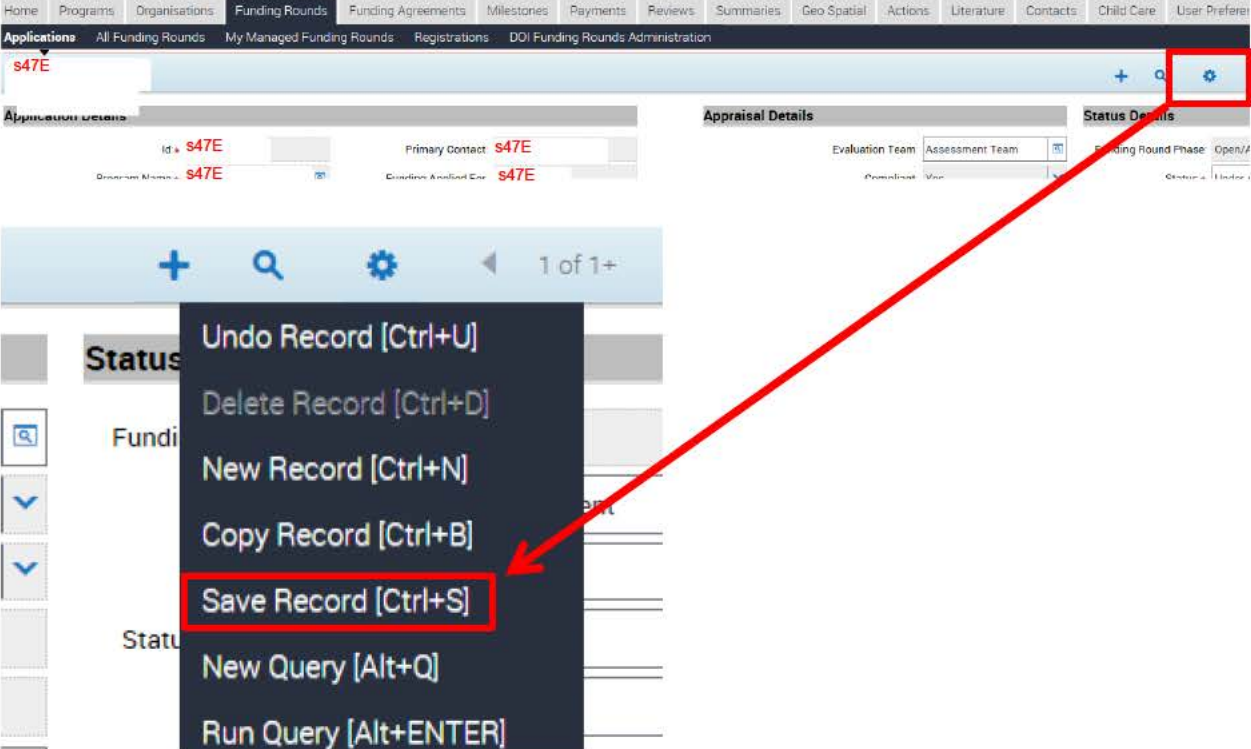


Steps	Actions																		
26	<p>From the Appraisal Type drop down menu select <b>Moderated</b>.</p>  <table border="1"><thead><tr><th>Use as Final</th><th>Appraisal Type</th><th>Appraiser Last Name</th><th>Appraiser First Name</th><th>Status</th><th>Sc</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>Assessment</td><td></td><td></td><td>Baseline</td><td></td></tr><tr><td><input checked="" type="checkbox"/></td><td></td><td></td><td></td><td>Not Started</td><td></td></tr></tbody></table>	Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	Sc	<input type="checkbox"/>	Assessment			Baseline		<input checked="" type="checkbox"/>				Not Started	
Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	Sc														
<input type="checkbox"/>	Assessment			Baseline															
<input checked="" type="checkbox"/>				Not Started															
27	<p>In the <b>Appraiser Last Name</b> field, click the glyph </p>  <table border="1"><thead><tr><th>Appraisal Type</th><th>Appraiser Last Name</th><th>Appraiser First Name</th><th>Status</th></tr></thead><tbody><tr><td>Moderated</td><td><input type="text"/></td><td></td><td>Not Started</td></tr><tr><td>Assessment</td><td>Administrator</td><td>s47E</td><td>Baseline</td></tr></tbody></table>	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	Moderated	<input type="text"/>		Not Started	Assessment	Administrator	s47E	Baseline						
Appraisal Type	Appraiser Last Name	Appraiser First Name	Status																
Moderated	<input type="text"/>		Not Started																
Assessment	Administrator	s47E	Baseline																
28	<p>A pop up box will open. Highlight your name. Click <b>OK</b>.</p>  <p>Pick Employee</p> <p>Last Name <input type="text"/></p> <p>Last Name First Name Login Position Job Title</p> <table border="1"><tbody><tr><td>s47E</td><td></td><td></td><td>FaCS App...</td><td></td></tr></tbody></table> <p>« Previous Page « Previous Record Next Record » Next Page</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>	s47E			FaCS App...														
s47E			FaCS App...																

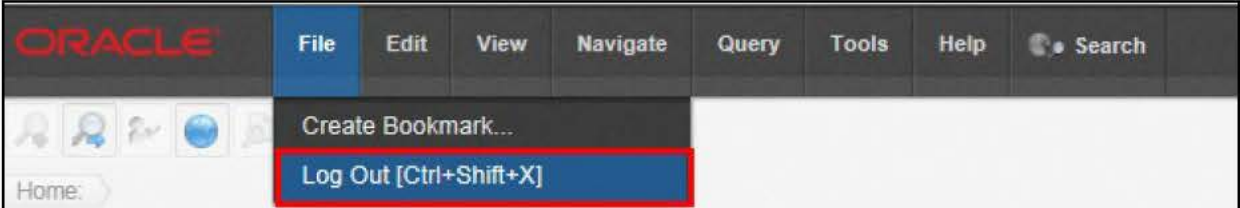
Steps	Actions
29	<p>Change the <b>Status</b> to <b>In Progress</b>.</p>  <p>The screenshot shows a table with columns: Appraisal Type, Appraiser Last N, Appraiser First N, Status, and Score. A record is highlighted in yellow with 'Moderated' in the Appraisal Type column, 'Administrator' in the Appraiser Last N column, and 'Not Started' in the Status column. A dropdown menu is open over the 'Not Started' status, and the 'In Progress' option is selected and highlighted with a red box.</p>
30	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>  <p>The screenshot shows the application's top navigation bar with various tabs like 'Home', 'Programs', 'Organisations', etc. Below the navigation bar, there's a search bar and a gear icon. A context menu is open over the gear icon, listing several actions: 'Undo Record [Ctrl+U]', 'Delete Record [Ctrl+D]', 'New Record [Ctrl+N]', 'Copy Record [Ctrl+B]', 'Save Record [Ctrl+S]', 'New Query [Alt+Q]', and 'Run Query [Alt+ENTER]'. The 'Save Record [Ctrl+S]' option is highlighted with a red box, and a red arrow points from the gear icon to this option.</p>
31	<p>Highlight the moderator appraisal record ticked <b>Use as Final</b> with the status <b>In Progress</b>.</p>  <p>The screenshot shows the 'Appraisals' table with columns: Use as Final, Appraisal Type, Appraiser Last Name, Appraiser First Name, and Status. A record is highlighted in yellow with a checked box in the 'Use as Final' column, 'Moderated' in the Appraisal Type column, and 'In Progress' in the Status column.</p>

Steps	Actions
32	<p>Change the status from <b>In Progress</b> to <b>Completed</b>.</p>  <p>Compliance Criteria Eligibility Criteria <b>Appraisals</b> Grant Agreement Information Agreement Information</p> <p>Appraisals</p> <p>Use as Final Appraisal Type Appraiser Last Name Appraiser First Name Status Score Banding</p> <p><input checked="" type="checkbox"/> Moderated s47E In Progress <b>Completed</b> Withdrawn Baseline</p>
33	<p>Enter your name in the <b>Departmental Contacts</b> section by selecting the glyph  in the Last Name field.</p>  <p>s47E</p> <p><b>Application Details</b></p> <p>Id s47E Primary Contact s47E      Program Name s47E Funding Applied For s47E      Funding Round Name s47E Recommended Funding s47E      Registration Id s47E Places/Services Applied For      Financial Year 2016-2017 Recommended Places/Services      Number Application State NSW      Submission Date 24/01/2017 01:21:31 PM Late Application On Time      Received Date 24/01/2017 Submission Type Online - External HTML      Funding Round Type Number of Attachments 3      Application Submission Reference s47E</p> <p><b>Appraisal Details</b></p> <p>Evaluation Team Assessment Team      Compliant Yes      Eligible Yes      Score 6      Banding 1      Ranking OP      QA Review <input checked="" type="checkbox"/></p> <p><b>Status Details</b></p> <p>Funding Round Phase Open/Appraise      Status Under Assessment      Sub Status Complete      Status Change Date 10/02/2017      Shortlisted      Check Application <input checked="" type="checkbox"/>      Funding Round Defaults Checked <input type="checkbox"/>      Minute Generated <input type="checkbox"/>      Minute/Ref Number</p> <p><b>Organisation Details</b></p> <p>Legal Entity Id s47E Provider Id s47E      Legal Entry Name s47E Provider Name s47E      Legal Entity Address s47E Business Name s47E      Legal Entity Status Active Business Name from ABR <input checked="" type="checkbox"/></p> <p><b>Departmental Contacts</b></p> <p>Last Name <input type="text"/>       First Name <input type="text"/>      Phone <input type="text"/>      Email Address <input type="text"/></p> <p><b>Departmental Contacts</b></p> <p>Last Name: <input type="text"/>       First Name: <input type="text"/>      Phone: <input type="text"/>      Email Address: <input type="text"/></p>

Steps	Actions																																			
34	<p data-bbox="220 353 1404 470">A pop-up box will open. In the <b>Starting with</b> field enter the Moderator last name and select. Highlight your name in the list of results and click <b>OK</b>. Your name will be recorded as the Departmental Contact.</p> <div data-bbox="236 495 1452 1556"><p data-bbox="240 495 539 544">Pick Employee <span data-bbox="1417 495 1449 539">X</span></p><p data-bbox="240 595 1449 660"><input data-bbox="240 595 459 660" type="text"/> Last Name <input data-bbox="464 595 1173 660" type="text" value="s47E"/> <input data-bbox="1204 595 1268 660" type="button" value="➔"/> 1 - 10 of 12+</p><table border="1" data-bbox="240 683 1452 1377"><thead><tr><th>Last Name</th><th>First Name</th><th>Login</th><th>Position</th><th>Job Title</th></tr></thead><tbody><tr><td>s47E</td><td></td><td></td><td>FaCS App...</td><td>DSS Application Appraiser</td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td></tr></tbody></table><p data-bbox="512 1429 1182 1458">⏪ Previous Page ⏪ Previous Record Next Record ⏩ Next Page ⏩</p><p data-bbox="1193 1473 1444 1545"><input data-bbox="1193 1473 1289 1545" type="button" value="OK"/> <input data-bbox="1305 1473 1444 1545" type="button" value="Cancel"/></p></div>	Last Name	First Name	Login	Position	Job Title	s47E			FaCS App...	DSS Application Appraiser																									
Last Name	First Name	Login	Position	Job Title																																
s47E			FaCS App...	DSS Application Appraiser																																

Steps	Actions
35	<p>Save the record using <b>Ctrl+S</b> or click the  drop down and select <b>Save Record</b>.</p>  <p>The screenshot shows the FOFMS application interface. At the top, there is a navigation bar with tabs for Home, Programs, Organisations, Funding Rounds, Funding Agreements, Milestones, Payments, Reviews, Summaries, Geo Spatial, Actions, Literature, Contacts, Child Care, and User Preferences. Below this, there is a sub-navigation bar with tabs for Applications, All Funding Rounds, My Managed Funding Rounds, Registrations, and DOI Funding Rounds Administration. The main content area displays application details for a record with ID s47E. A dropdown menu is open, showing options: Undo Record [Ctrl+U], Delete Record [Ctrl+D], New Record [Ctrl+N], Copy Record [Ctrl+B], Save Record [Ctrl+S] (highlighted with a red box), New Query [Alt+Q], and Run Query [Alt+ENTER]. A red arrow points from a gear icon in the top right corner of the application to the 'Save Record' option in the dropdown menu.</p>

## Log Out of FOFMS

Steps	Actions
36	<p>To log out of FOFMS select File then Log Out or use shortcut <b>Ctrl+Shift+X</b>.</p>  <p>The screenshot shows the Oracle application menu bar. The menu items are File, Edit, View, Navigate, Query, Tools, Help, and Search. The 'File' menu is open, showing options: Create Bookmark... and Log Out [Ctrl+Shift+X] (highlighted with a red box).</p>

## Need Help?

For further assistance please speak to your Team Leader.



# FOFMS TASKCARD

## Quality Assurance (QA) Review

This task card will take you through the process of completing a QA review of an assessed application in FOFMS.

Contents	Page
Open the Assessment Tool and the Assessment Record .....	2
Undertake QA of Assessment Tool and Assessment Record .....	7
Update Workbook/Notify Assessor .....	13
Need Help? .....	14

### Before you begin ensure you have:

- The details of the completed assessment that is ready for a QA review
  - FOFMS ID
  - Organisation Name

### FOFMS Access Required:

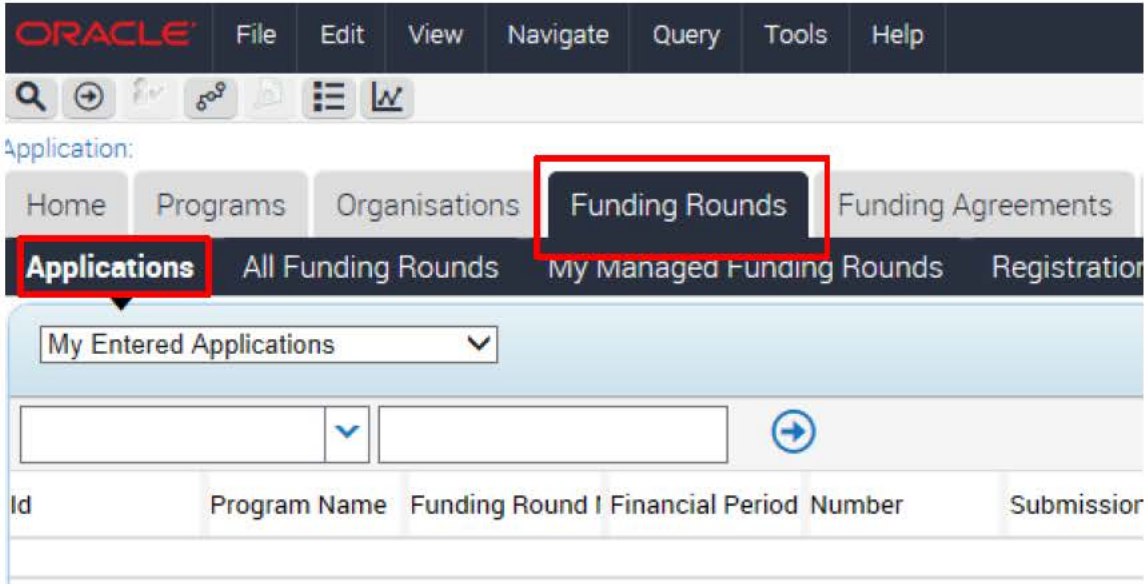
- FOFMS Funding Round Manager

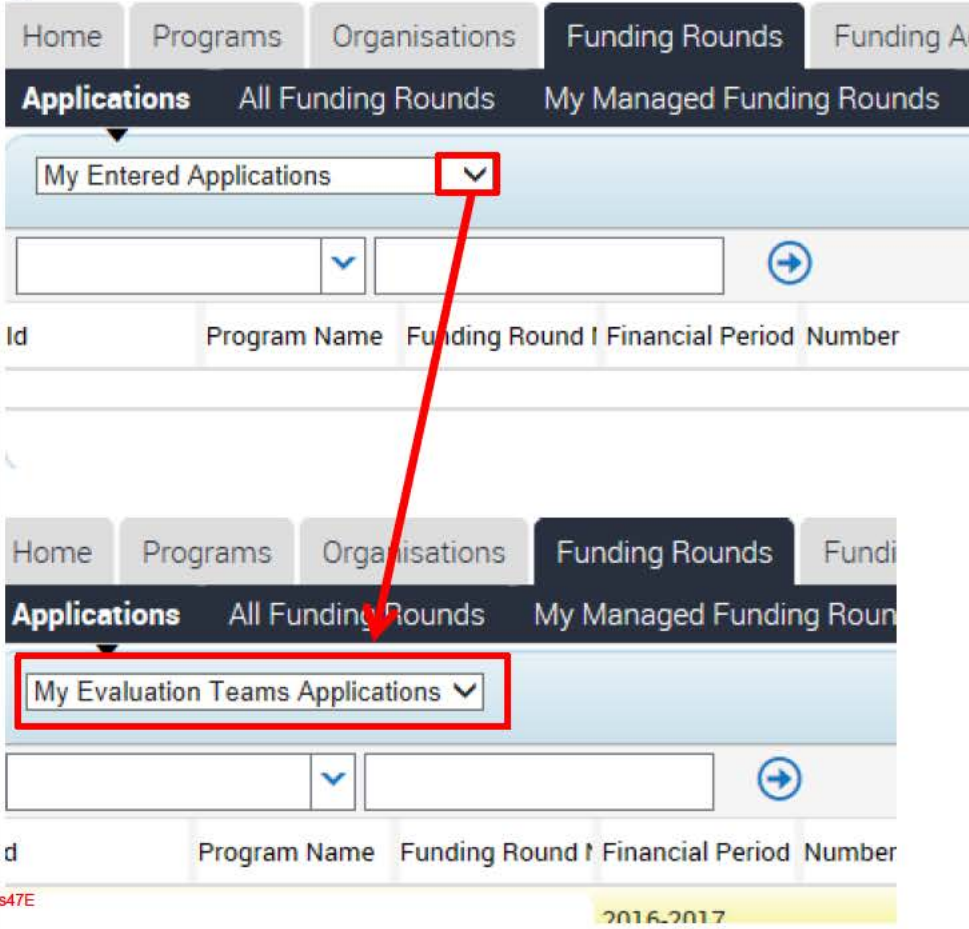
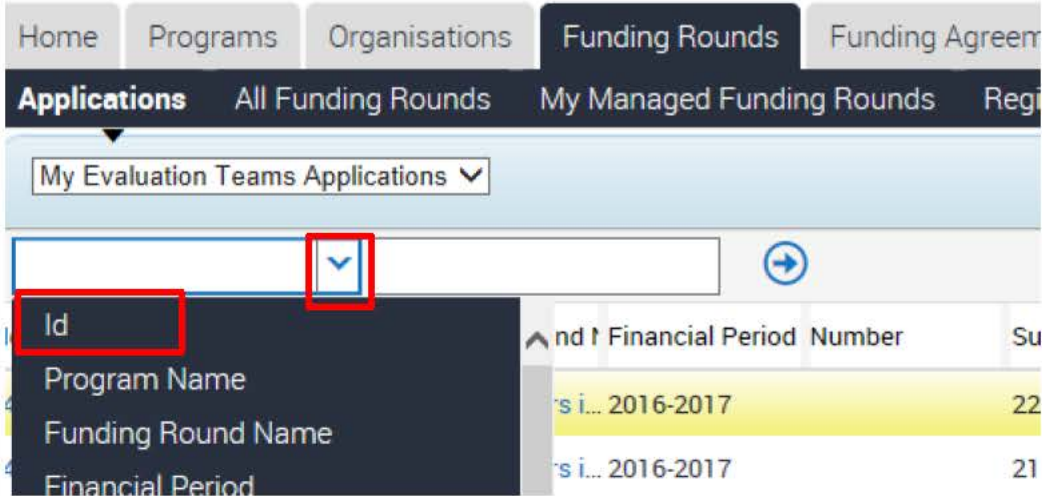
**\*If at any step you feel you have made an incorrect selection, press 'Esc' and attempt the step again. If this fails to resolve the issue, speak to your Team Leader.**

### Update Instructions For Each Funding Round


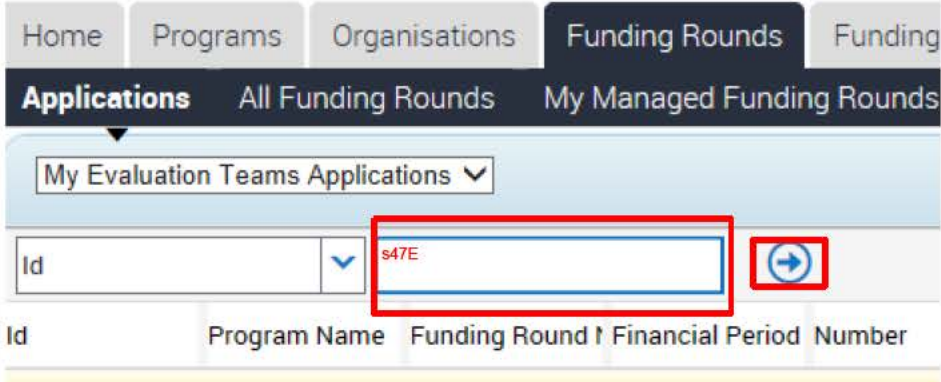
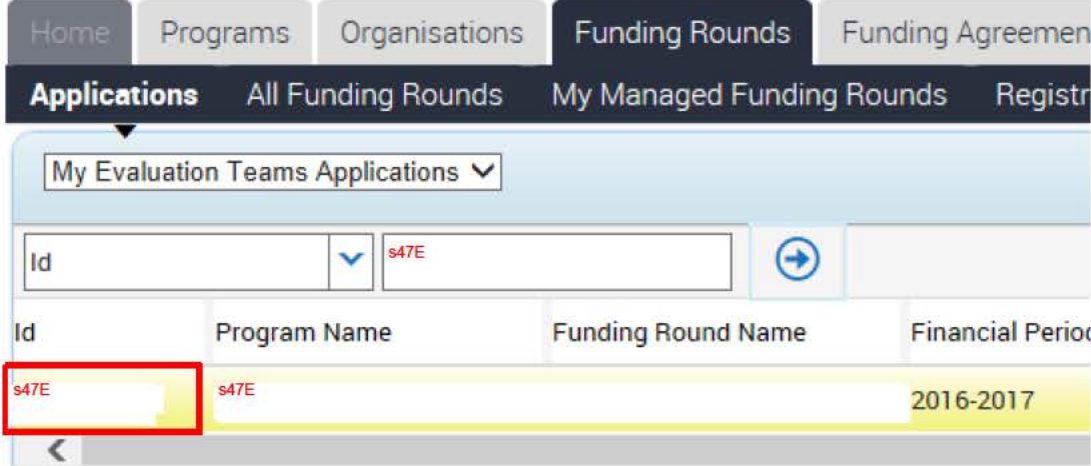
- Update steps 1 and 21 with the appropriate ARC Folder Record Number
- Add or change steps as required to reflect funding round specific processes

## Open the Assessment Tool and the Assessment Record


Steps	Actions
1	<p>Open <b>ARC</b> to access the completed Assessment Tool.</p> <p><b>ARC Folder</b> – EFXX/XXXXXX</p> <p>The naming convention for the Assessment Tool will be <b>FOFMS ID – Organisation Name - Assessment</b></p>
2	<p>Open <b>FOFMS</b> to access the Assessment Record.</p>
3	<p>Select the Funding Rounds tab and select the Applications link.</p>  <p>The screenshot shows the Oracle FOFMS application interface. At the top is the Oracle menu bar with options: File, Edit, View, Navigate, Query, Tools, Help. Below the menu bar is a toolbar with various icons. The main navigation area has several tabs: Home, Programs, Organisations, <b>Funding Rounds</b> (highlighted with a red box), and Funding Agreements. Under the 'Funding Rounds' tab, there are sub-tabs: <b>Applications</b> (highlighted with a red box), All Funding Rounds, My Managed Funding Rounds, and Registration. Below the sub-tabs is a dropdown menu labeled 'My Entered Applications'. At the bottom of the screenshot, a table header is visible with columns: Id, Program Name, Funding Round I, Financial Period, Number, and Submission.</p>

Steps	Actions
<p>4</p>	<p>Click on the drop down menu Select <b>My Evaluation Team's Applications</b>.</p>  <p>The screenshot shows a navigation bar with tabs: Home, Programs, Organisations, Funding Rounds, and Funding Agreements. Below this is a sub-menu with 'Applications', 'All Funding Rounds', and 'My Managed Funding Rounds'. The 'Applications' dropdown is expanded, showing 'My Entered Applications' (with a dropdown arrow) and 'My Evaluation Teams Applications' (highlighted with a red box). Below the menu is a search bar and a table with columns: Id, Program Name, Funding Round, Financial Period, and Number. A table row is partially visible with '2016-2017' highlighted in yellow.</p>
<p>5</p>	<p>Click on the drop down menu. Select <b>Id</b>.</p>  <p>The screenshot shows the same navigation bar as above. The 'Applications' dropdown is expanded to 'My Evaluation Teams Applications'. Below it is a search bar with a dropdown arrow (highlighted with a red box) and a search button. A dropdown menu is open, listing 'Id', 'Program Name', 'Funding Round Name', and 'Financial Period'. The 'Id' option is highlighted with a red box. Below the menu is a table with columns: Id, Program Name, Funding Round, Financial Period, and Number. A table row is visible with '2016-2017' highlighted in yellow.</p>

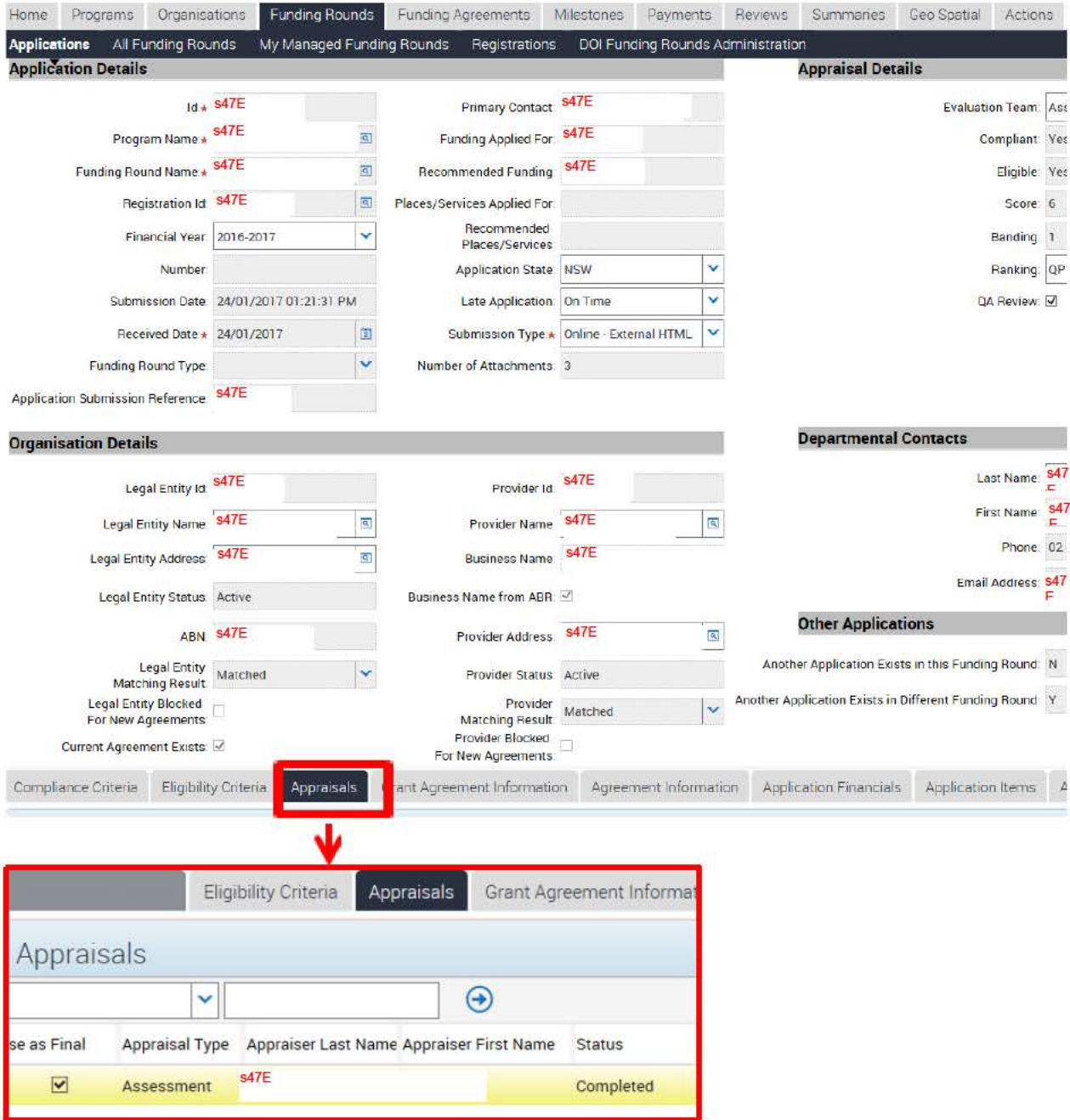


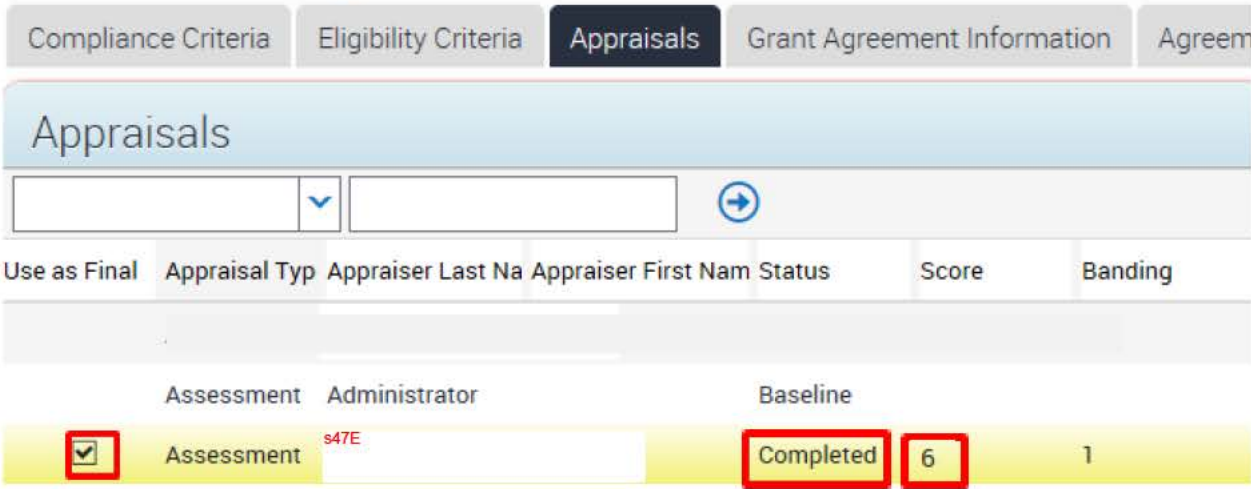
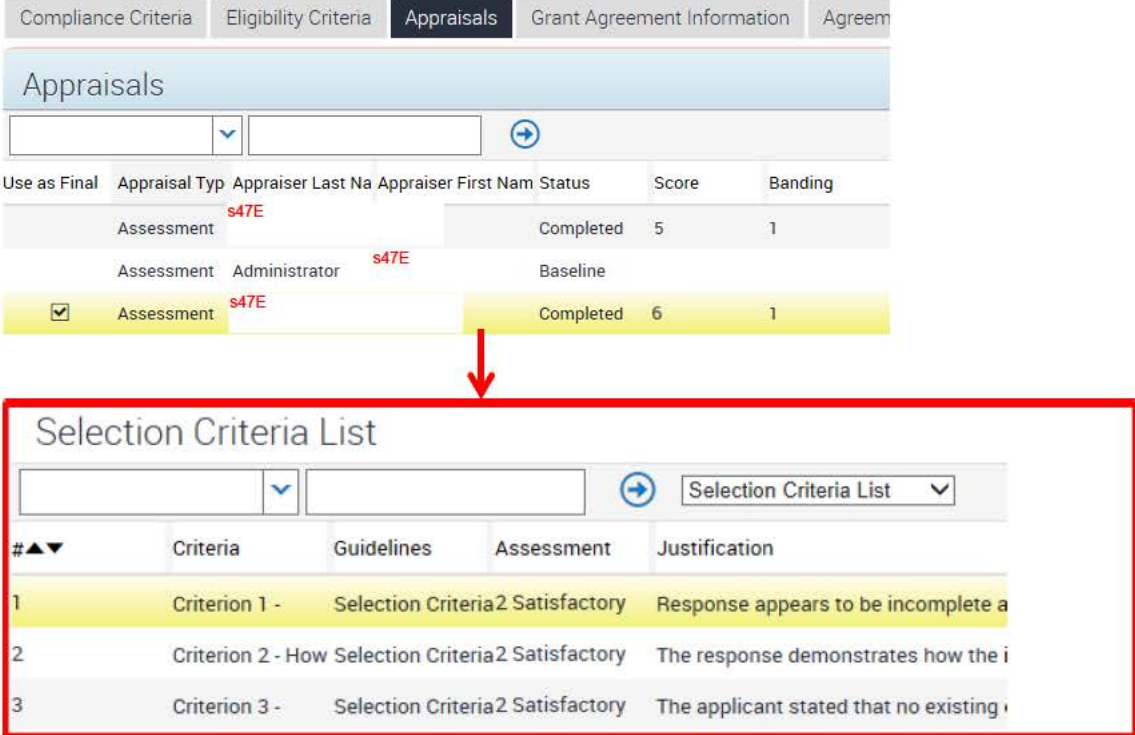
Steps	Actions
6	<p data-bbox="204 219 890 257">Enter the <b>Application Id</b> in the next field. Click .</p>  <p data-bbox="204 734 1141 810">The application record will open. Click on the <b>hyperlink</b> in the <b>Id</b> column to open the Application Record.</p> 

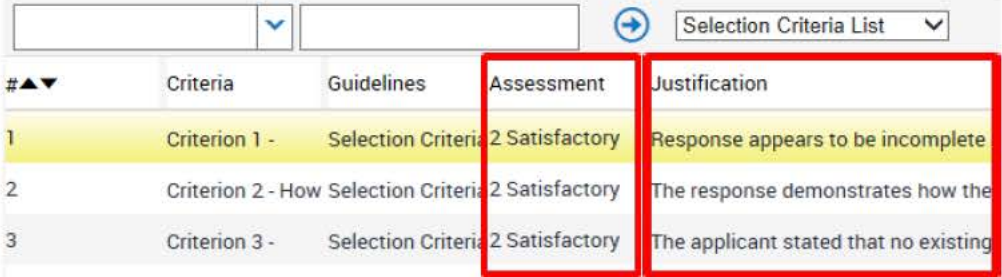
Steps	Actions						
7	<p data-bbox="209 197 1300 275">Confirm the Application Status is <b>Under Assessment</b> and Sub Status is <b>Complete</b>. If not, consult the assessor who is recorded in the Evaluation Team field.</p> <div data-bbox="209 286 1460 593"><p>s47E</p><table border="1"><thead><tr><th>Application Details</th><th>Appraisal Details</th><th>Status Details</th></tr></thead><tbody><tr><td><p>Id: s47E</p><p>Program Name: s47E</p><p>Funding Round Name: s47E</p><p>Registration Id: s47E</p><p>Financial Year: 2016-2017</p><p>Submission Date: 24/01/2017 01:21:31 PM</p><p>Received Date: 24/01/2017</p><p>Funding Round Type:</p></td><td><p>Primary Contact: s47E</p><p>Funding Applied For: s47E</p><p>Recommended Funding: s47E</p><p>Places/Services Applied For:</p><p>Recommended Places/Services:</p><p>Application State: NSW</p><p>Late Application: On Time</p><p>Submission Type: Online - External HTML</p><p>Number of Attachments: 3</p></td><td><p>Evaluation Team: Assessment Team</p><p>Compliant: Yes</p><p>Eligible: Yes</p><p>Score: 6</p><p>Banding: 1</p><p>Ranking: QP</p><p>DA Review:</p><p>Funding Round Phase: Open/Appraise</p><p>Status: Under Assessment</p><p>Sub Status: Complete</p><p>Status Change Date: 10/02/2017</p><p>Shortlisted:</p><p>Check Application: <input checked="" type="checkbox"/></p><p>Round Defaults Checked: <input type="checkbox"/></p><p>Minute Generated: <input type="checkbox"/></p><p>Minute/Ref Number:</p></td></tr></tbody></table></div> <div data-bbox="209 674 863 719"><h3>Status Details</h3></div> <div data-bbox="209 745 863 1344"><p>Funding Round Phase: Open/Appraise</p><p>Status: <b>Under Assessment</b></p><p>Sub Status: <b>Complete</b></p><p>Status Change Date: 10/02/2017</p><p>Shortlisted:</p><p>Check Application: <input checked="" type="checkbox"/></p><p>Round Defaults Checked: <input type="checkbox"/></p><p>Minute Generated: <input type="checkbox"/></p><p>Minute/Ref Number:</p></div>	Application Details	Appraisal Details	Status Details	<p>Id: s47E</p> <p>Program Name: s47E</p> <p>Funding Round Name: s47E</p> <p>Registration Id: s47E</p> <p>Financial Year: 2016-2017</p> <p>Submission Date: 24/01/2017 01:21:31 PM</p> <p>Received Date: 24/01/2017</p> <p>Funding Round Type:</p>	<p>Primary Contact: s47E</p> <p>Funding Applied For: s47E</p> <p>Recommended Funding: s47E</p> <p>Places/Services Applied For:</p> <p>Recommended Places/Services:</p> <p>Application State: NSW</p> <p>Late Application: On Time</p> <p>Submission Type: Online - External HTML</p> <p>Number of Attachments: 3</p>	<p>Evaluation Team: Assessment Team</p> <p>Compliant: Yes</p> <p>Eligible: Yes</p> <p>Score: 6</p> <p>Banding: 1</p> <p>Ranking: QP</p> <p>DA Review:</p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: Under Assessment</p> <p>Sub Status: Complete</p> <p>Status Change Date: 10/02/2017</p> <p>Shortlisted:</p> <p>Check Application: <input checked="" type="checkbox"/></p> <p>Round Defaults Checked: <input type="checkbox"/></p> <p>Minute Generated: <input type="checkbox"/></p> <p>Minute/Ref Number:</p>
Application Details	Appraisal Details	Status Details					
<p>Id: s47E</p> <p>Program Name: s47E</p> <p>Funding Round Name: s47E</p> <p>Registration Id: s47E</p> <p>Financial Year: 2016-2017</p> <p>Submission Date: 24/01/2017 01:21:31 PM</p> <p>Received Date: 24/01/2017</p> <p>Funding Round Type:</p>	<p>Primary Contact: s47E</p> <p>Funding Applied For: s47E</p> <p>Recommended Funding: s47E</p> <p>Places/Services Applied For:</p> <p>Recommended Places/Services:</p> <p>Application State: NSW</p> <p>Late Application: On Time</p> <p>Submission Type: Online - External HTML</p> <p>Number of Attachments: 3</p>	<p>Evaluation Team: Assessment Team</p> <p>Compliant: Yes</p> <p>Eligible: Yes</p> <p>Score: 6</p> <p>Banding: 1</p> <p>Ranking: QP</p> <p>DA Review:</p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: Under Assessment</p> <p>Sub Status: Complete</p> <p>Status Change Date: 10/02/2017</p> <p>Shortlisted:</p> <p>Check Application: <input checked="" type="checkbox"/></p> <p>Round Defaults Checked: <input type="checkbox"/></p> <p>Minute Generated: <input type="checkbox"/></p> <p>Minute/Ref Number:</p>					

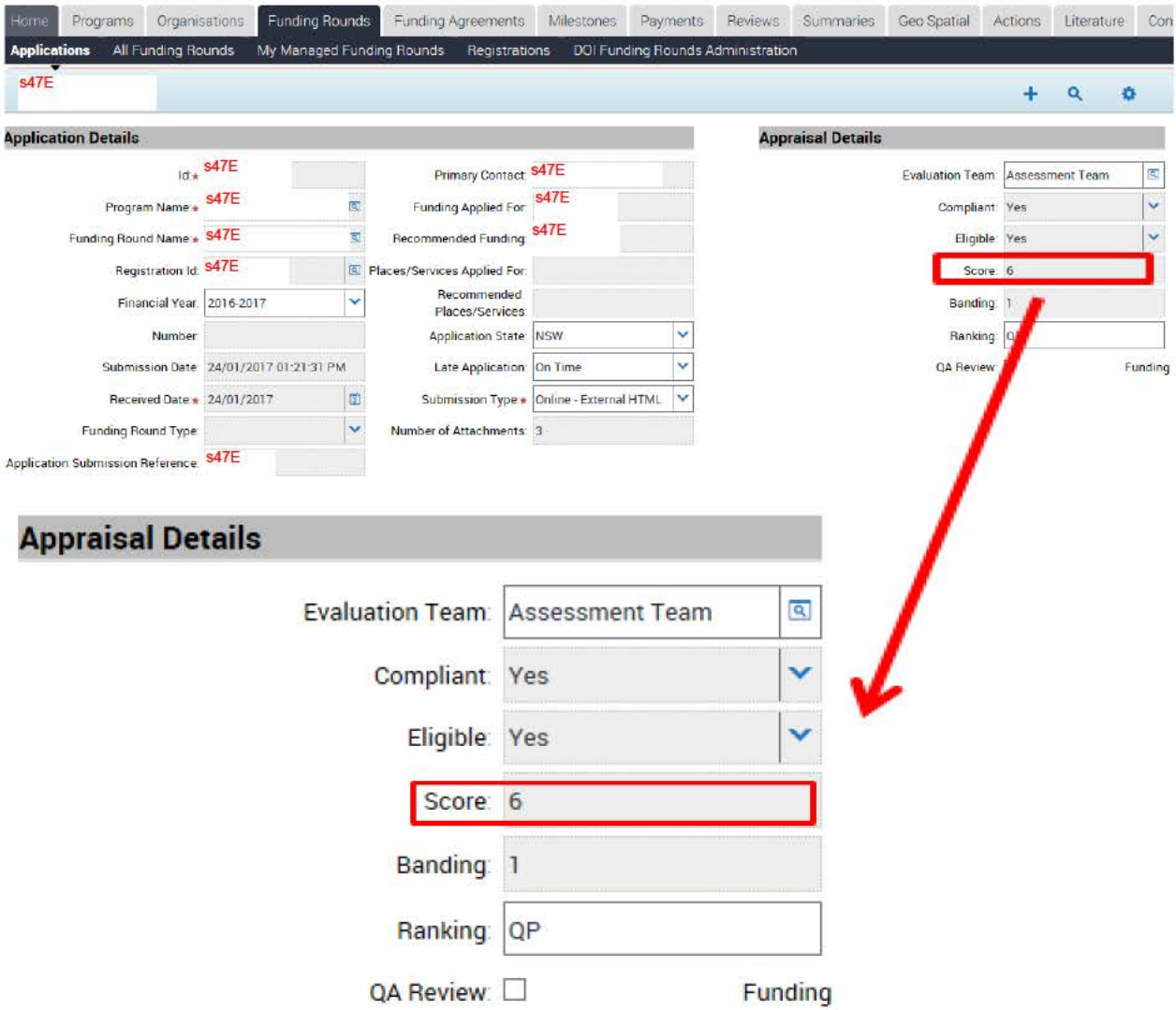
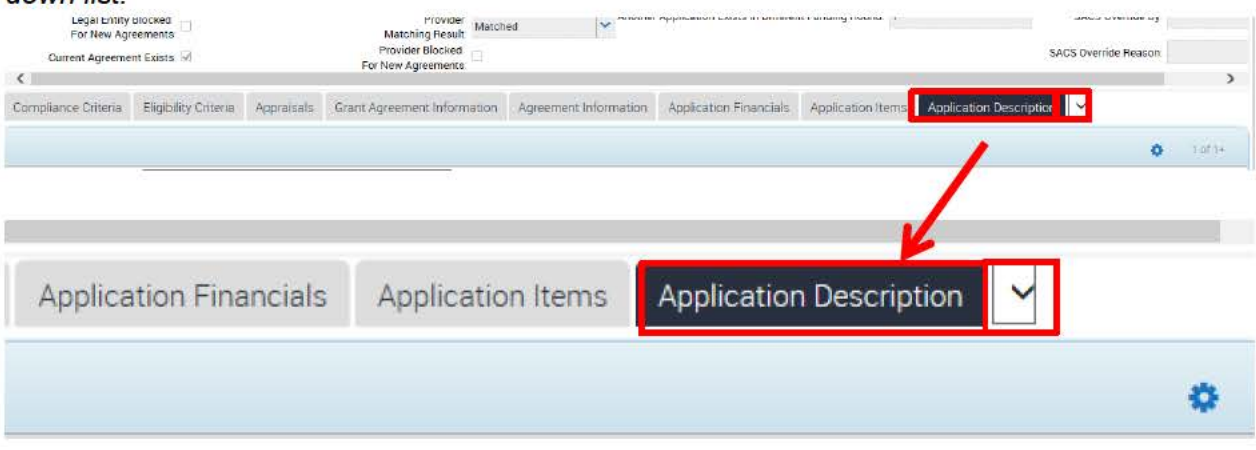
Steps	Actions																						
8	<p data-bbox="209 203 756 237">Check the Application <b>Submission Type</b>.</p> <p data-bbox="209 257 1249 291">If the Submission Type is 'Manual' discuss the process with your Team Leader.</p> <div data-bbox="209 309 1465 376"><p>s47E</p></div> <table border="1" data-bbox="209 392 1465 862"><thead><tr><th data-bbox="209 392 1161 425">Application Details</th><th data-bbox="1161 392 1465 425">Appraisal Details</th></tr></thead><tbody><tr><td data-bbox="209 436 702 862">Id: s47E Program Name: s47E Funding Round Name: s47E Registration Id: s47E Financial Year: 2016-2017 Number: Submission Date: 24/01/2017 01:21:31 PM Received Date: 24/01/2017 Funding Round Type: Application Submission Reference: s47E</td><td data-bbox="702 436 1465 862">Primary Contact: s47E Funding Applied For: s47E Recommended Funding: s47E Places/Services Applied For: Recommended Places/Services: Application State: NSW Late Application: On Time Submission Type: Online - External HTML Number of Attachments: 3</td></tr></tbody></table> <table border="1" data-bbox="209 952 813 1545"><tbody><tr><td>Primary Contact:</td><td>s47E</td></tr><tr><td>Funding Applied For:</td><td>s47E</td></tr><tr><td>Recommended Funding:</td><td>s47E</td></tr><tr><td>Places/Services Applied For:</td><td></td></tr><tr><td>Recommended Places/Services:</td><td></td></tr><tr><td>Application State:</td><td>NSW</td></tr><tr><td>Late Application:</td><td>On Time</td></tr><tr><td>Submission Type:</td><td>Online - External HTML</td></tr><tr><td>Number of Attachments:</td><td>3</td></tr></tbody></table> 	Application Details	Appraisal Details	Id: s47E Program Name: s47E Funding Round Name: s47E Registration Id: s47E Financial Year: 2016-2017 Number: Submission Date: 24/01/2017 01:21:31 PM Received Date: 24/01/2017 Funding Round Type: Application Submission Reference: s47E	Primary Contact: s47E Funding Applied For: s47E Recommended Funding: s47E Places/Services Applied For: Recommended Places/Services: Application State: NSW Late Application: On Time Submission Type: Online - External HTML Number of Attachments: 3	Primary Contact:	s47E	Funding Applied For:	s47E	Recommended Funding:	s47E	Places/Services Applied For:		Recommended Places/Services:		Application State:	NSW	Late Application:	On Time	Submission Type:	Online - External HTML	Number of Attachments:	3
Application Details	Appraisal Details																						
Id: s47E Program Name: s47E Funding Round Name: s47E Registration Id: s47E Financial Year: 2016-2017 Number: Submission Date: 24/01/2017 01:21:31 PM Received Date: 24/01/2017 Funding Round Type: Application Submission Reference: s47E	Primary Contact: s47E Funding Applied For: s47E Recommended Funding: s47E Places/Services Applied For: Recommended Places/Services: Application State: NSW Late Application: On Time Submission Type: Online - External HTML Number of Attachments: 3																						
Primary Contact:	s47E																						
Funding Applied For:	s47E																						
Recommended Funding:	s47E																						
Places/Services Applied For:																							
Recommended Places/Services:																							
Application State:	NSW																						
Late Application:	On Time																						
Submission Type:	Online - External HTML																						
Number of Attachments:	3																						


# Undertake QA of Assessment Tool and Assessment Record

Steps	Actions										
9	<p>Select the Appraisals tab and scroll down to the Appraisal records.</p>  <p>The screenshot shows a web application interface with the following sections:</p> <ul style="list-style-type: none"> <li><b>Navigation:</b> Home, Programs, Organisations, <b>Funding Rounds</b>, Funding Agreements, Milestones, Payments, Reviews, Summaries, Geo Spatial, Actions.</li> <li><b>Application Details:</b> <ul style="list-style-type: none"> <li>Id: s47E</li> <li>Program Name: s47E</li> <li>Funding Round Name: s47E</li> <li>Registration Id: s47E</li> <li>Financial Year: 2016-2017</li> <li>Submission Date: 24/01/2017 01:21:31 PM</li> <li>Received Date: 24/01/2017</li> <li>Funding Round Type: [Dropdown]</li> <li>Application Submission Reference: s47E</li> </ul> </li> <li><b>Appraisal Details:</b> <ul style="list-style-type: none"> <li>Primary Contact: s47E</li> <li>Funding Applied For: s47E</li> <li>Recommended Funding: s47E</li> <li>Application State: NSW</li> <li>Late Application: On Time</li> <li>Submission Type: Online - External HTML</li> <li>Number of Attachments: 3</li> <li>Evaluation Team: [Dropdown]</li> <li>Compliant: Yes</li> <li>Eligible: Yes</li> <li>Score: 6</li> <li>Banding: 1</li> <li>Ranking: QP</li> <li>QA Review: <input checked="" type="checkbox"/></li> </ul> </li> <li><b>Organisation Details:</b> <ul style="list-style-type: none"> <li>Legal Entity Id: s47E</li> <li>Legal Entity Name: s47E</li> <li>Legal Entity Address: s47E</li> <li>Legal Entity Status: Active</li> <li>ABN: s47E</li> <li>Legal Entity Matching Result: Matched</li> <li>Legal Entity Blocked For New Agreements: <input type="checkbox"/></li> <li>Current Agreement Exists: <input checked="" type="checkbox"/></li> <li>Provider Id: s47E</li> <li>Provider Name: s47E</li> <li>Business Name: s47E</li> <li>Business Name from ABR: <input checked="" type="checkbox"/></li> <li>Provider Address: s47E</li> <li>Provider Status: Active</li> <li>Provider Matching Result: Matched</li> <li>Provider Blocked For New Agreements: <input type="checkbox"/></li> </ul> </li> <li><b>Departmental Contacts:</b> <ul style="list-style-type: none"> <li>Last Name: s47E</li> <li>First Name: s47E</li> <li>Phone: 02</li> <li>Email Address: s47E</li> </ul> </li> <li><b>Other Applications:</b> <ul style="list-style-type: none"> <li>Another Application Exists in this Funding Round: N</li> <li>Another Application Exists in Different Funding Round: Y</li> </ul> </li> <li><b>Navigation Tabs:</b> Compliance Criteria, Eligibility Criteria, <b>Appraisals</b>, Grant Agreement Information, Agreement Information, Application Financials, Application Items.</li> </ul> <p>The 'Appraisals' table is shown below:</p> <table border="1"> <thead> <tr> <th>Use as Final</th> <th>Appraisal Type</th> <th>Appraiser Last Name</th> <th>Appraiser First Name</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Assessment</td> <td>s47E</td> <td></td> <td>Completed</td> </tr> </tbody> </table>	Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	<input checked="" type="checkbox"/>	Assessment	s47E		Completed
Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status							
<input checked="" type="checkbox"/>	Assessment	s47E		Completed							

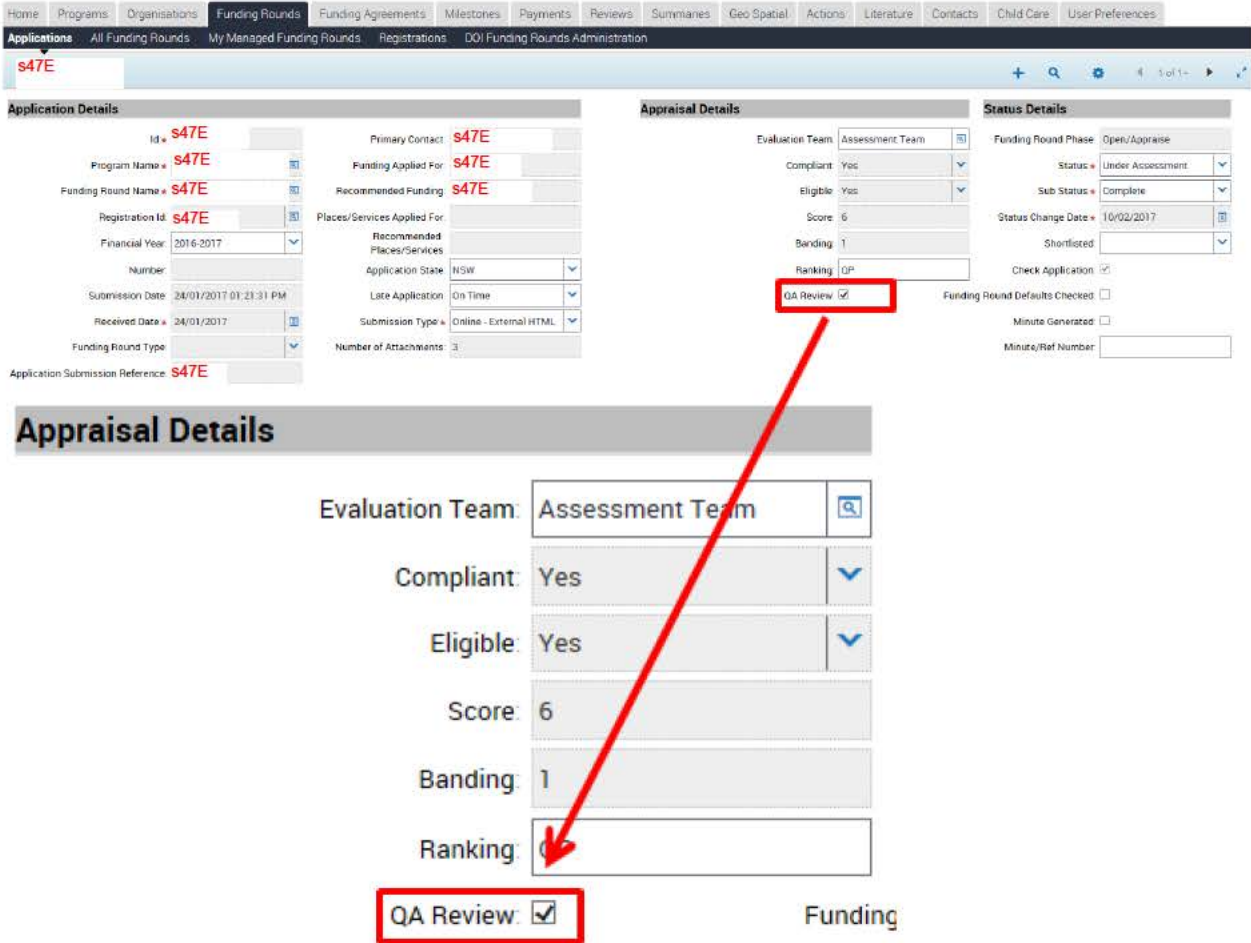
Steps	Actions
<p><b>10</b></p>	<p>Highlight the record ticked Use as Final. Confirm the Status is Completed and a Score has populated.</p> 
<p><b>11</b></p>	<p>Scroll down to the Selection Criteria List</p> 

Steps	Actions																				
12	<p>For each of the Selection Criteria:</p> <ul style="list-style-type: none"> <li>Confirm the score in the Assessment column matches the score in the Assessment Tool                             <ul style="list-style-type: none"> <li>1 = Poor or Limited</li> <li>2 = Satisfactory</li> <li>3 = Good</li> <li>4 = Very Good</li> <li>5 = Excellent</li> </ul> </li> <li>Confirm the text in the Assessment Tool matches the text in the Justification column.</li> </ul> <p>Selection Criteria List</p>  <table border="1" data-bbox="215 638 1220 913"> <thead> <tr> <th>#▲▼</th> <th>Criteria</th> <th>Guidelines</th> <th>Assessment</th> <th>Justification</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Criterion 1 -</td> <td>Selection Criteria</td> <td>2 Satisfactory</td> <td>Response appears to be incomplete</td> </tr> <tr> <td>2</td> <td>Criterion 2 - How</td> <td>Selection Criteria</td> <td>2 Satisfactory</td> <td>The response demonstrates how the</td> </tr> <tr> <td>3</td> <td>Criterion 3 -</td> <td>Selection Criteria</td> <td>2 Satisfactory</td> <td>The applicant stated that no existing</td> </tr> </tbody> </table>	#▲▼	Criteria	Guidelines	Assessment	Justification	1	Criterion 1 -	Selection Criteria	2 Satisfactory	Response appears to be incomplete	2	Criterion 2 - How	Selection Criteria	2 Satisfactory	The response demonstrates how the	3	Criterion 3 -	Selection Criteria	2 Satisfactory	The applicant stated that no existing
#▲▼	Criteria	Guidelines	Assessment	Justification																	
1	Criterion 1 -	Selection Criteria	2 Satisfactory	Response appears to be incomplete																	
2	Criterion 2 - How	Selection Criteria	2 Satisfactory	The response demonstrates how the																	
3	Criterion 3 -	Selection Criteria	2 Satisfactory	The applicant stated that no existing																	

Steps	Actions
13	<p>Confirm the total score in the Assessment Tool is the sum of the selection criterion scores. Confirm the total score matches the score in FOFMS.</p>  <p>The screenshot shows the 'Assessment Tool' interface. At the top, there are navigation tabs: Home, Programs, Organisations, Funding Rounds, Funding Agreements, Milestones, Payments, Reviews, Summaries, Geo Spatial, Actions, Literature, and Con. Below these are sub-tabs: Applications, All Funding Rounds, My Managed Funding Rounds, Registrations, and DOI Funding Rounds Administration. The main content area is divided into two sections: 'Application Details' and 'Appraisal Details'. The 'Application Details' section includes fields for Id #, Program Name, Funding Round Name, Registration Id, Financial Year, Number, Submission Date, Received Date, Funding Round Type, and Application Submission Reference. The 'Appraisal Details' section includes fields for Evaluation Team, Compliant, Eligible, Score, Banding, Ranking, QA Review, and Funding. A red box highlights the 'Score 6' field in the Appraisal Details section, and a red arrow points to it from the right.</p>
14	<p>Select the <b>Application Description</b> tab.</p> <p><i>Note: If you cannot view the Application Description, select Application Description from the drop down list.</i></p>  <p>The screenshot shows the 'Assessment Tool' interface with the 'Application Description' tab selected. The interface includes a top navigation bar with tabs: Compliance Criteria, Eligibility Criteria, Appraisals, Grant Agreement Information, Agreement Information, Application Financials, Application Items, and Application Description. A red box highlights the 'Application Description' tab, and a red arrow points to it from the right.</p>

Steps	Actions
15	<p>Confirm the Assessor has populated the Application Description view tab.</p> <p>Confirm that the Summary of Application and Summary of Assessment fields in FOFMS match the Assessment Tool.</p> <p><i>Note: Each field has a 2000 character limit including spaces.</i></p>  <p>The screenshot shows a software interface with two text input fields. The top field is labeled 'Summary of Application:' and is empty. The bottom field is labeled 'Summary of Assessment:' and contains the text 'test'. Both fields are enclosed in red rectangular boxes. There are small icons to the left of each field and vertical scroll bars to the right of each field.</p>




Steps	Actions
16	<p>If there are no QA issues in FOFMS or the Assessment Tool:</p> <ul style="list-style-type: none"> <li>• Tick the QA review box (This will notify the Moderators that the application is ready for moderation).</li> </ul> <p>If there are QA issues in FOFMS or in the Assessment Tool:</p> <ul style="list-style-type: none"> <li>• Do not tick the QA review box.</li> </ul>  <p>The screenshot shows a web application interface with the following sections:</p> <ul style="list-style-type: none"> <li><b>Application Details:</b> Includes fields for Id (s47E), Program Name (s47E), Funding Round Name (s47E), Registration Id (s47E), Financial Year (2016-2017), Number, Submission Date (24/01/2017 01:21:31 PM), Received Date (24/01/2017), Funding Round Type, and Application Submission Reference (s47E).</li> <li><b>Appraisal Details:</b> Includes Evaluation Team (Assessment Team), Compliant (Yes), Eligible (Yes), Score (6), Banding (1), and Ranking (GP). A red box highlights the 'QA Review' checkbox, which is checked. A red arrow points from this checkbox to the 'QA Review' checkbox in the instructions above.</li> <li><b>Status Details:</b> Includes Funding Round Phase (Open/Appraise), Status (Under Assessment), Sub Status (Complete), Status Change Date (10/02/2017), Shortlisted, Check Application (checked), Funding Round Defaults Checked, Minute Generated, and Minute/Ref Number.</li> </ul>

## Update Workbook/Notify Assessor

Steps	Actions
17	<p>If there are no QA issues:</p> <ul style="list-style-type: none"> <li>Go to step 21</li> </ul> <p>If there are QA issues:</p> <ul style="list-style-type: none"> <li>The application will require a partial re-assessment by the original Assessor.</li> <li>Go to Step 18</li> </ul>
18	<p>From the Sub Status drop down menu re-set from Completed to Appraisal.</p> <div data-bbox="225 663 999 987"> <p><b>Status Details</b></p> <p>Funding Round Phase: Open/Appraise</p> <p>Status: <input type="text" value="Under Assessment"/> ▼</p> <p>Sub Status: <input type="text" value="Appraisal"/> ▼</p> </div>

Steps	Actions
20	<p>Open and complete the <b>QA – Partial Re-Assessment</b> email template to notify the Assessor of the QA issues.</p> <p>Provide a detailed and clear description of the issues so that the Assessor understands what corrections are required. Discuss with the Assessor if necessary.</p> <p><b>ARC Document – D16/7538081 – Template #7</b></p>
21	<p>Update the QA Workbook</p> <p><i>Note: If the Moderator is also undertaking the QA Review, update the Moderator Workbook.</i></p> <p><b>ARC Folder – EFXX/XXXXXX</b></p>
22	<p>Save and Close the Assessment Tool and the QA Workbook.</p> <p>Log out of FOFMS</p>

## Logging Out of FOFMS

Steps	Actions
1	<p>To log out of FOFMS select <b>File</b> then <b>Log Out</b> or use shortcut <b>Ctrl+Shift+X</b>.</p> 

## Need Help?

For further assistance please contact your Team Leader.



Australian Government

Community  
Grants Hub  
Improving your grant experience

FOI 18/19-056  
Item 4  
Document 8



# Assessment Matrix

**Program Name**  
**Selection ID: XXXX-XXX**  
**Funding Round Name**  
**Restricted/Open Selection Process**

Assessors must use this Assessment Matrix to rate each application against the nominated selection criteria, noting the following:

- The Assessment Matrix is a six-point (0-5) rating scale, with each score corresponding to a quality rating and rating description.
- The rating description reflects the level of information provided by an applicant against a selection criterion, which determines the score and quality rating for that criterion.
- Assessors determine an application's overall score by combining the scores for all criteria.

Applications must be completed in accordance with the **Program Opportunity Guidelines** and other documents in the application pack.

**Selection Criterion 1 – *Insert Selection Criterion 1 as described in Funding Round Summary (Bold).***

The response **must** demonstrate:

- *Insert Selection Criterion attributes as described in Funding Round Summary.*

Score	0	1	2	3	4	5
Quality rating	Does not meet criterion	Poor response	Satisfactory response	Good response	Very good response	Excellent response
Rating description	Applicant has not provided a response. <b>OR</b> Response does not address the criterion.	Provides <b>limited</b> information.	Provides a <b>basic</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	Provides a <b>relevant and convincing</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	Provides a <b>comprehensive</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	<b>Significantly exceeds</b> the expected response for a score of 4.

**Selection Criterion 2 – *Insert Selection Criterion 2 as described in Funding Round Summary (Bold).***

The response **must** demonstrate:

- *Insert Selection Criterion attributes as described in Funding Round Summary.*

Score	0	1	2	3	4	5
Quality rating	Does not meet criterion	Poor response	Satisfactory response	Good response	Very good response	Excellent response
Rating description	Applicant has not provided a response. <b>OR</b> Response does not address the criterion.	Provides <b>limited</b> information.	Provides a <b>basic</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	Provides a <b>relevant and convincing</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	Provides a <b>comprehensive</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	<b>Significantly exceeds</b> the expected response for a score of 4.

**Selection Criterion 3 – *Insert Selection Criterion 3 as described in Funding Round Summary (Bold).***

The response **must** demonstrate:

- *Insert Selection Criterion attributes as described in Funding Round Summary.*

Score	0	1	2	3	4	5
Quality rating	Does not meet criterion	Poor response	Satisfactory response	Good response	Very good response	Excellent response
Rating description	Applicant has not provided a response. <b>OR</b> Response does not address the criterion.	Provides <b>limited</b> information.	Provides a <b>basic</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	Provides a <b>relevant and convincing</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	Provides a <b>comprehensive</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	<b>Significantly exceeds</b> the expected response for a score of 4.

**Selection Criterion 4 – *Insert Selection Criterion 4 as described in Funding Round Summary (Bold).***

The response **must** demonstrate:

- *Insert Selection Criterion attributes as described in Funding Round Summary.*

Score	0	1	2	3	4	5
Quality rating	Does not meet criterion	Poor response	Satisfactory response	Good response	Very good response	Excellent response
Rating description	Applicant has not provided a response. <b>OR</b> Response does not address the criterion.	Provides <b>limited</b> information.	Provides a <b>basic</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	Provides a <b>relevant and convincing</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	Provides a <b>comprehensive</b> description of: <i>insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as “your organisation” with “the organisation” to make the statement generic.</i>	<b>Significantly exceeds</b> the expected response for a score of 4.





Australian Government

**Community Grants Hub**  
Improving your grant experience



<b>Applicant Legal Name</b>			
<b>FOFMS Application ID</b>		<b>Total Score</b>	
<b>Assessor</b>		<b>Assessment Date</b>	XX/XX/XXXX
<b>Moderator</b>		<b>Moderation Date</b>	XX/XX/XXXX

**Summary of Application**  
*(2000 character limit including spaces)*

**The Summary of Application is a short summary of the activity proposal.**

- This should be pre-filled in FOFMS with words provided by the applicant in their form (under the heading Activity Description).

**Summary of Assessment**  
*(2000 character limit including spaces)*

Not Applicable

**Criterion 1**

<b>Describe how the implementation of your proposal will achieve the Activity objectives for all stakeholders, including value for money within the Grant funding.</b>	<b>Score</b>	
--	--------------	--

Write a sentence or two that summarises the applicant’s response to the criterion, including the quality, the number of requirements that have been met and the evidence provided.

Write the requirements of the criterion as either strengths or weaknesses. There may be only strengths or only weaknesses.

**Strengths**

- 

**Weaknesses**

-



