

NETSCC MIS Brief – Chief Investigator

Introduction to NETSCC MIS

NETSCC is introducing a new Management Information System (the NETSCC MIS) to help us provide a consistent and high-quality research management service to all our external stakeholders. Use of the NETSCC MIS will help us target, plan, fund and manage research more effectively and meet the changing needs of the research community, health practitioners, the public and funders.

We will use the NETSCC MIS for all our programme activities, including applications and funding, monitoring and reviews. The new system makes the best use of web-based technology and will replace a number of systems currently being used by NETSCC.

The way that NETSCC works with you is not changing – we are just asking you to interact with us and provide us with information in a slightly different way.

The NETSCC MIS is very easy to use. It has extensive online help facilities as part of the system, with support available from your usual NETSCC contact.

The NETSCC MIS can be accessed using this link - <https://netscc-mis.nihr.ac.uk/mis>

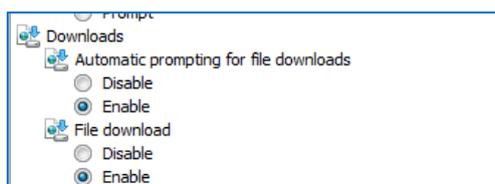
On the Log in screen you will see comments about Pop-ups, Cookies and PDFs.

- You need to ensure that your browser allows pop-ups from the NETSCC MIS
- You need to make sure that your browser is set to allow Cookies
- The NETSCC MIS uses PDFs extensively so you need to have Adobe Reader installed on your PC so you can read PDFs (Adobe Reader is a free download)

The NETSCC MIS works across a wide range of internet browsers. However, we recommend you use the following:

- Windows users - Internet Explorer (versions 7, 8 and 9), Firefox or Chrome
- Apple users - Safari or Firefox
- Linux users - Opera

In some cases, if you use Internet Explorer, when you try and download something from the NETSCC MIS, the screen briefly opens up and then disappears with no download available. This is an internet explorer issue and can be fixed when you are in Internet Explorer by clicking on Tools, Internet Options and on the Security tab clicking the Custom Level button.



Scroll down until you get to the Downloads section and in “Automatic prompting for file downloads” and “File download” select the Enable option.

Logging In

- In Login ID enter the email address you are registered with.
- In Password enter your password.
- Click the Log In button.

Passwords

Passwords must be between 8 and 16 characters and contain at least one upper case character, one lower case character, one number and one special character e.g. !, \$, %, *, #, cannot contain your first or last name and must be different from your last 3 passwords.

Locked Account

- If you get your password wrong 4 times your account will be locked – contact NETSCC to get it unlocked.
- For NETSCC contact details click on the “For technical assistance” link at the bottom of the screen (click on the word “here”).

Forgotten Password

- If you forget your password click on the Forgot your password? link.
- In the Password Assistance screen in Login ID enter the email address you log in with and click Submit.
- You will be sent a temporary password with which you can log in, you will then be asked to enter a new password and to confirm it.

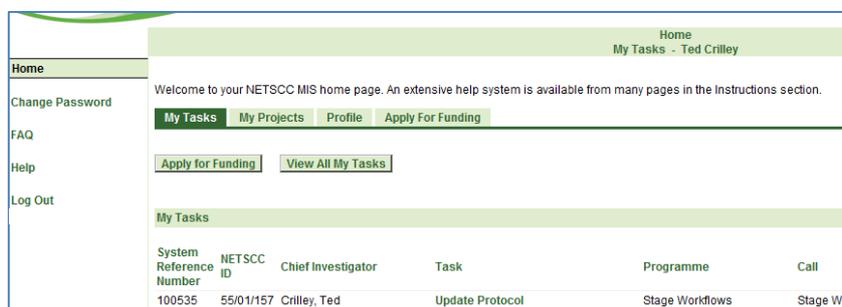
Change Password

- You can change your password whenever you wish by using the Change Password option in the left-hand menu when you are logged into the NETSCC MIS. You will be asked to enter your current password and then the new password twice. Click Save when you have entered the password details.

Navigation Principles

Tabs

Once you are logged into the NETSCC MIS you will see four tabs across the top of the screen.



My Tasks – lists all your outstanding tasks (i.e. tasks that you have not yet submitted to NETSCC).

In the My Tasks tab there are two other buttons at the top of the screen:

Apply for Funding - Click this button to apply for a funding opportunity (takes you into the same screen as selecting the Apply for Funding tab)

View All My Tasks - Click this button to view a list of all your tasks including ones you have completed and submitted to NETSCC.

Note: If there are more than 15 in your list, at the bottom right of the screen click **Next 15** to view the next 15 or click **Show All** to list them all.

Note: You can sort the list into any order by clicking a column heading. The list will be sorted in ascending order based on the information in that column. A second click on the same column sorts the list into descending order.

If you wish to see what information you entered in a completed task click the View PDF button.

My Projects – gives you access to information about all projects that you are (or have been) Chief Investigator for. Clicking on a project's NETSCC ID or System Reference Number will take you into a screen with four further tabs.

- **Project Details** shows registration details and protocols you have uploaded.
- **Contacts** shows details of co-applicants and any other related person contacts.
- **Reporting and Progress** shows the reporting schedule and your key progress tables.
- **Tasks and Documents** shows the tasks completed so far and allows you to view PDFs of those tasks and documents you have uploaded in their original file format.

Profile – allows you to view and update information about yourself including your contact details and your qualifications and posts held.

Apply For Funding – allows you to apply for a funding opportunity

Left-hand menu

When you are on your home screen the left-hand menu contains options to change your password, view frequently asked questions about the NETSCC MIS and Log Out.

When you are in a task the left-hand menu lists the screens that make up that task. Most tasks will have a Main screen at the top of the list and a Review & Submit screen at the bottom with the screens pertaining to the task between these two. To complete the task you will need to access each screen and enter the required information.

Contact Details

You can update some of your basic contact information by selecting the Profile tab and choosing the View My Contact Details option. Before completing any further applications for funding we recommend you ensure this information is accurate as these details will then be brought across into all subsequent applications.

- In the basic name details at the top of the screen amend anything as required. If you amend any details click Save
- In any of the sections below (Address, Phone and Fax, E-mail Address and Web Address) you can Add new details, Edit existing details and Delete details no longer needed.

Note: If your address is in the UK (England, Scotland, Wales, N Ireland, Isle of Man, Jersey and Guernsey) you can use the Find Address postcode finder to find the address.

Note: For some contact details, you can only delete a non-primary entry. If you want to delete the primary entry, you first need to make another entry primary or add a new entry and make that primary (you can only have one primary entry in each section).

Note: If you change your primary email address the new email address will become your Login ID.

CV Details

You can update your CV information (qualifications and posts held) by selecting the Profile tab and choosing the View Update CV option. Before completing any further applications for funding we recommend you ensure this information is accurate as these details will then be brought across into all subsequent applications.

- In the Degrees and Professional Qualifications section and the Present and Previous Positions Held section you can Add new details, Edit existing details and Delete details no longer needed.

Tasks Overview

The NETSCC MIS is a task-driven workflow system and whenever we need you to provide information about your project a task will appear in your task list on your home screen. So that you don't need to keep logging in to the NETSCC MIS to see if we have sent you a task, when we need you to complete a task an email will be sent to your Primary email address telling you about the task and asking you to log in and provide the information.

Most of the tasks you complete will be initiated by us in this way but as a Chief Investigator there are two tasks that you can initiate whenever you need to; when you want to send us notification of a project output and when you need to send us an up-to-date version of your project protocol.

Enter or Update Output Notification

When you need to send us notification of a project output (publications, press releases, presentations etc.) or update details of an output you have already notified us of, without us requesting it, you need to create your own output notification task:

- Select the My Projects tab to see a list of your projects.
- Click on the relevant project's NETSCC ID or System Reference Number.
- In the Grantee Requests/Actions section choose Enter or Update Output Notification from the drop down list and click the Request button.
- You will be taken into the Update Output Notification task screens so that you can enter the information.

Note: If you need any help completing the screens in this task click on the "For help and guidance click here." link at the top of the screen (click on the word "here").

If you come out of the task without submitting it, for whatever reason, you can go back into the task to complete it from the task list on your home screen.

Update Protocol

When you need to send us an up-to-date version of your project protocol, without us requesting it, you need to create your own update protocol task:

- Select the My Projects tab to see a list of your projects.
- Click on the relevant project's NETSCC ID or System Reference Number.
- In the Grantee Requests/Actions section choose Update Protocol from the drop down list and click the Request button.
- You will be taken into the Update Protocol task screens so that you can upload the protocol.

Note: If you need any help completing the screens in this task click on the "For help and guidance click here." link at the top of the screen (click on the word "here").

If you come out of the task without submitting it, for whatever reason, you can go back into the task to complete it from the task list on your home screen.

Completing Tasks

When you log into the NETSCC MIS the home screen (My Tasks tab) displays a list of all the tasks we require you to complete that you have not yet submitted as well as any output notification and protocol tasks you have initiated but not yet submitted.

For some tasks you have the option to give edit access to members of your team to complete some, or all, of the screens on your behalf. The people you give edit access to will be able to enter information but will not be able to do the final submission of the task – that is something only you can do. The tasks where this option is available are noted in the task list at the end of this document.

To access a task click the link to the task (the green name of the task). This takes you into the first screen which is normally the Main screen, unless it is a task that only has one screen.

To complete the task, select the first screen (after Main) from the left-hand menu and start entering the information we have requested. The NETSCC MIS will take you through the screens in order until you get to the Review and Submit screen, unless it is a task that only has one screen. When you have entered any required information in a screen use Save and Continue to move to the next screen rather than the left-hand menu which will not save the information you have entered.

If at any point you need to revisit a screen to add further information or amend what you have entered click on the link to that screen in the left-hand menu remembering to Save any new information you enter.

Note: If you need any help completing the screens click the “For help and guidance click here.” link at the top of the screen (click the word “here”) for instructions on how to complete the screen you are currently on or contact a member of NETSCC staff.

When you have entered all the required information you must Submit the task to send the information to NETSCC. For most tasks the Submit button is at the top of the Review and Submit screen but for tasks with a single screen you will find the Submit button at the bottom of the screen.

On the Review and Submit screen if any red crosses are displayed use the left-hand menu or the link to the page name in the Validation Status screen to revisit the relevant section to supply the missing mandatory information. If there is a red cross in an Uploads section it is likely that this is because one of the documents you uploaded has not finished converting to a pdf, if this is the case click F5 to refresh the screen (you may have to do this more than once) until the red cross becomes a green tick. There may also be yellow warnings for sections where the information is not mandatory but may be required for your particular project. Yellow warnings will not stop you submitting the task.

Page Name	Status
Contract Variation Items	✓ Complete
Detailed Budget You requested a significant virement of funds. Please adjust the revised budget.	⚠ Attention
Text Areas Justification is required. Impact if approved is required. Impact if not approved is required. Project Progress is required.	✗ Incomplete
Uploads	✓ Complete
Access Rights	✓ Complete

Once you’ve submitted a task it is removed from your My Tasks list and you can no longer enter information into it.

Note: If you have submitted a task in error before you have entered all the information please contact NETSCC who are able to re-open it for you.

Chief Investigator Task List

The following is a list of all the tasks you could be asked to complete throughout the life of your project (depending on the type of project):

- Provide Evidence of Clinical Trials Authorisation (MHRA)
- Provide Evidence of Ethical Approval
- Provide Sponsorship Letter
- Update CTU Involvement
- Request Early Release of Funds
- Enter Key Progress Targets *
- Upload Project Management Plan
- Enter Output Notification
- Provide Project Oversight and Management Groups
- Submit Protocol
- Update Protocol
- Enter Registration Information
- Verify Expected Start Date
- Confirm & Update Website Information
- Acknowledge Contract
- Confirm Project Start
- Provide Contract Variation Details *
- Acknowledge Contract Variation
- Complete Key Progress Figures Report *
- Complete Project Oversight Management Report
- Provide Annual Programme Grant Report *
- Provide Management Fellowship Progress Report
- Submit Progress Report *
- Submit Summary Progress Report *
- Submit Detailed Financial Reconciliation *
- Submit Summary Financial Reconciliation *
- Upload Financial Reconciliation
- Provide Closure Plan *
- Provide Management Fellowship Final Report
- Submit Draft Final Report *
- Submit Final Financial Reconciliation *
- Update Output Notification

* Tasks marked with an asterisk are tasks for which you can give edit access to members of your team to complete screens on your behalf.