Accreditation Returns – Grantium guidance

This information sheet is designed to help you to fill in your Accreditation return application on Grantium. You should read this supplementary guidance alongside the main [Accreditation Guidance](#) and the [Completing your application on Grantium](#) systems guidance.

In this sheet, we will talk about the following.

Essential Grantium tips

Grantium application portal home page link
https://applications.artscouncil.org.uk/frontOffice.jsf

Your internet browser
Grantium will work in any internet browser, but it needs to be the most up to date version of that browser. You can check if your browser is up to date here:
https://www.whatismybrowser.com/

Do not use your browser Back and Forward buttons
You will not be able to use your browser 'Back' and 'Forward' buttons whilst using Grantium. Instead, you need to navigate back and forwards by using Grantium buttons and using the menus. If you try to use your browser buttons you will get an 'unexpected error' message and may need to restart Grantium.

Character count in free-text boxes
For the free-text boxes that you fill in, Grantium uses a different method of character count than Microsoft Word. Please bear this in mind if you draft your answers in MS Word to copy and paste over. Grantium counts spaces, line breaks and special characters as characters whereas MS Word doesn't.

Save often - Automatic log off 20 minutes after you last clicked a button / link
Grantium will log you out 20 minutes after you last clicked a button or link. Typing in boxes **does not** count as activity, only clicking a button or link – so please remember to click **Save** often. You will receive a warning pop up when you are getting close to being timed out.

Attachments
We can accept attachments in the following formats and up to 10MB each:
PDF, MS Word, MS Excel, MS PowerPoint and jpeg

Mandatory fields
All fields marked with an **Asterisk*** are mandatory. These fields must be completed before you can submit your form.

Locating your application form

This guidance begins at the point where you have already created an applicant profile and have set up an application form via the *Browse Programme* menu.

We've included **an overview on how to create an applicant profile and open a blank application form in Appendix A of this document**. For more detailed instructions on these areas please see [Accreditation - Getting Started on Grantium](#)

To access the blank application form you have already created, log on to [Grantium homepage](#), then click on **Submissions** in the left-hand menu.

Next go to the 'Applicant' dropdown at the top left of the screen and select your organisation Applicant Name. Make sure all filters are cleared. To open the form click on the **orange folder** icon on the right-hand side of your Accreditation application beginning ACCR-.

Remember **to make a note of your application form Project Number**. This will start with **ACCR**-. This will help you locate your application form next time you log in. If you need to contact us with a query about your application, please quote the Project Number as it will make it easier for us to find your application.

If you log out of Grantium and need to come back to find your application again to continue working on it, log back in, click on **Submissions** in the left-hand menu, then click on the **orange folder** icon next to your application.

Important – if you started your application on Grantium prior to Covid some of the information you entered will now be out of date. Before you submit the revised application could you **please carefully review your application to ensure that all information, dates, and the supporting evidence attached is up to date and reflects the current position of the museum.**

Navigating the application

Once you have your application form open, on the left-hand side of the screen you will see the **Application Submission** workflow. This lists all the sections that you need to fill in, page by page.

You can navigate through your application either by clicking on these hyperlinks in the menu, or else when you fill in each page there will be a **Save and Next** button which will take you to the next page in the list.

You should **fill in the pages in order**, as the answers you provide will determine which subsequent questions and pages will open up to you.

Top tips – completing the application form page by page

Introduction page to Contact information page

Application submission

Introduction
Applicant details
Financial background
Address information
Contact information
Museum Details

The first page of the application form is an **Introduction** with links to guidance documents. Once you have read through this page, click **Next**.

The next three pages are pulled directly from your **Applicant profile**. You can review the information and click **Next** for each of these four pages. If you need to edit any of this information, this cannot be done from here.

Please note that some fields within your Applicant Profile are locked after validation. If you wish to amend your applicant name, organisation legal name, legal status, governing document, company number or charity number please email grant.management@artscouncil.org.uk

If you need to edit any other areas within your Applicant profile, go to your Grantium homepage and click **Applicants** in the left-hand menu. Follow the instructions in Appendix 1 of the Completing your application on Grantium guidance

Contact information screen

In the **Contact information** screen any contacts you have labelled as 'Museum Primary contact' or 'Museum Senior contact' will pull through directly from your applicant profile. You can add contacts to the screen by clicking on the plus icon to the top left of the Contact Information screen.

You can now start the main body of the application. All fields marked with an **Asterisk*** are mandatory.

Museum Details

See page 15 of the [Accreditation Guidance](#) for information on national / nationally-styled museums.

When you've filled in all mandatory fields, and updated all the information you need to, press **Save and Next**

Details about your application

See pages 11 - 15 of the [Accreditation Guidance](#) for information on museum classification.

Select the type of application as **Return Application**

When you've filled in all mandatory fields, and updated all the information you need to press **Save and Next**

Required actions/ areas for development (Returns only)

This is where you should report against your areas for improvement/ development. These will be outlined in your latest outcome letter.

To complete this section, you will need to click on the **add** icon:

Enter your relevant text into both boxes. If you only have one required action or area for development, then click **Save & Back to List**. If you have more than one, then click **Save & Add Another**, repeating this process until you have completed an entry for every required action or area for development. Then click **Save & Back to List.**

Click **Next** to move on to the next page.

Please note there is a place for you to upload attachments later in the application if you wish to provide more information than the text boxes allow.

Returns checklist

This is the **list of requirements of the Accreditation Standard**.

Each requirement that you tick here has a **corresponding section within the application form that you will need to complete**. On the **Required attachments** page you will also need to attach any documents we require from you based on the sections and questions you answer.

- **The eight requirements which are already ticked are mandatory** so we need you to complete these sections within the form. If possible, we ask that you report against **requirement 7.2 - An access plan**. For an overview of the eight mandatory requirements and the access plan, please see page 4 of the *Accreditation Returns Information Sheet*

- Please also **tick any other requirements where you need to tell us about any changes you've made since your last return**. This may be around 5 years ago so we appreciate a lot may have changed. E.g., please provide any updated policies or plans. You can also give details of any changes in your governance or management structure.

When you have ticked the additional requirements you will report on, press **Save & Next**

Requirement Screens

Work through each Requirement section, filling in all mandatory fields on each page. (Note - the answers you provide to some questions will inform which documents you will later need to upload to the **Required attachment** screen). When you've filled in all mandatory fields on each screen, press **Save and Next** to move on to the next section.

Requirement 3.1 (if relevant to your application)

To complete this section, you will need to click on the add icon:

Enter your relevant answers in the boxes. If you only have one premises to detail, then click **Save & Back to List**. If you have more than one, then click **Save & Add**

Another, repeating this process until you have completed an entry for every premises. Then click **Save & Back to List.** Click **Next** to move on to the next page.

Additional Information

If you'd like to tell us about any significant achievements at your museum since your last submission, please share them with us on this screen.

Governance document

Your governance document is pulled directly onto the Governance document page in the application from your **Applicant profile**. You can review the document by clicking on the **magnifying glass** icon:

If the governing document is still your current one you don't need to do anything.

If the governing document is not your current one, and you need to change it, you will need to do this by updating your applicant profile. If you need to update the governing document in your applicant profile please email grant.management@artscouncil.org.uk. Please do not submit the application until the updated governing document is showing on this screen.

Required Attachments

As you worked through the Requirements screens you will have ticked boxes to confirm that you will upload an attachment as part of that question.

As a result, on the Required Attachments screen, **under the heading Required attachment name,** you will now see a bespoke list of the documents you need to upload

You will need to upload a document for each Required attachment on your list. If you have combined the documents then you will need to upload that same document multiple times against each requirement name and number on your list. When you upload a document to meet a specific requirement then the white check box to the right of the requirement name will be ticked and greyed out.

We suggest you either **make a note of the required attachment names in your list, take a screen shot of the list or download this section as a PDF to**

reference. You can then refer to the list as you upload documents on the following screens.

(To download a PDF copy of this section with your required documents list, go to the bottom of the left-hand menu and click **Export to PDF**. Click on **Unselect All Formlets** and then click in the box next to **Required attachments** (<u>NOT</u> Required attachments --> attachment details). Then click **Export to PDF**. Click **Back** to return to the attachments page.)

Top tip: Set up a folder with all your required documents saved and scanned, named as the appropriate requirement number and title. Everything you need is then in one place for ease for uploading.

We can accept attachments in the following formats and up to 10mb each: PDF, MS Word, MS Excel, MS PowerPoint, and jpeg

<u>Uploading the Required Attachments</u>

You need to upload your documents one at a time. To attach a document click on a blue Attachment number hyper link:

Required attachments:						
Required attachment name						Attached
Forward/ business plan (Requirement 2.1)						☐
Signed approval or evidence of published approval for approved forward/ business plan (Requirement 2.1)						☐
Audited, signed and approved accounts for the last two available financial planning years (Requirement 2.2)						☐
Collections care and conservation policy (Requirement 6.1)						☐
Signed approval or evidence of published approval (Requirement 6.1)						☐

Document Type	Required?	Document description	Attachment type:	Date attached	Download	Delete
Attachment 01	No	--	---	No attachment		
Attachment 02	No	--	---	No attachment		
Attachment 03	No	--	---	No attachment		
Attachment 04	No	--	---	No attachment		
Attachment 05	No	--	---	No attachment		
Attachment 06	No	--	---	No attachment		
Attachment 07	No	--	---	No attachment		

This next page is where you upload your document. Go to the **Attachment type dropdown** (see screenshot below) and <u>select the relevant Requirement name that you wish to upload a document for</u> Please pay particular attention when you select the **Attachment type.** This list contains every possible kind of attachment which could be asked for in any kind of Accreditation application. Select the correct attachment type name from your bespoke list by referring to the PDF you downloaded, or the offline notes you made. Once you have uploaded the document, click **Save & Back to List**.

When you attach a document against a particular Requirement name and number in the Attachment type dropdown, you will then see that a grey tick will appear against that document on the Required attachments list page:

Repeat this action for every attachment you need to upload. When complete you should see a tick against every required attachment.

Additional Attachments

On this screen, please upload any additional documents you have not already included. These can include: Audience development plan, Learning plan, Access plan, Marketing plan, Collection management framework, Any other documents you want to share with us.

Repeat this process until you have ticks next to all your required attachments in that list. Then click **Save and Next** at the bottom of the page.

Monitoring information

Your monitoring information is pulled directly from your **Applicant profile**. If you need to change any of this information, this cannot be done from here, you need to edit it in your Applicant profile. For instructions on how to do this, please see Appendix 1 of the [Completing your application on Grantium](#) guidance. If you have any queries about updating your monitoring information page please contact our [Customer Services team](#).

Submitting your application

The last page to complete is the **Submission summary**. If you have a green tick next to each item in the list, then it will allow you to click **Submit**. If you have any red crosses, then you have not yet completed that page successfully – the blue hyperlink will tell you the reason it's not complete and will take you back to the right section to amend it:

Submission summary

Complete	Page	Last Updated	Mandatory
--	Introduction	No Input Required	No
✔	Applicant details	15/05/2019	Yes
--	Financial background	No Input Required	No
✔	Address information	15/05/2019	Yes
✔	Contact information	15/05/2019	Yes
✔	Details about your application	16/05/2019	Yes
✔	Required actions/ areas for development	16/05/2019	Yes
--	Returns checklist	No Input Required	No
✔	Requirement 2.1	16/05/2019	Yes
✔	Requirement 2.2	16/05/2019	Yes
✔	Requirement 3.2	16/05/2019	Yes
✔	Requirement 3.3	16/05/2019	Yes
✔	Requirement 4.2	16/05/2019	Yes
✔	Requirement 5.1	16/05/2019	Yes
✔	Requirement 6.1	16/05/2019	Yes
✔	Requirement 7.1	16/05/2019	Yes
✔	Governance document	15/05/2019	Yes
✘	Required attachments	Please Complete	Yes
--	Additional Attachments	No Input Required	No
✔	Monitoring information	15/05/2019	Yes
✔	Declaration	16/05/2019	Yes

Notes:

- Please attach all required Accreditation attachments. Click here to return to Required attachments form.

What happens next?

After you submit your application it will be assigned to an Assessor who will conduct a **First Review** of your application to determine if they need any more information from you or whether they have everything they need to assess your application.

Request for information

If the Assessor decides they do need to get in touch to ask you for more information, then this would be through Grantium. You will receive an email notification about this with instructions on how to submit the required information. The notification will be sent to all User Accounts linked to the Applicant Profile.

You would need to complete the Request for Information step on Grantium. You would find the step in the **Submissions** menu – in the same place where you would find an application that you had started. You would click on the **orange folder** next to the **Request for information** step against your Accreditation Project Number beginning ACCR-

You would then work through the pages in the same way as you did in your application. The **Submission Summary** at the end would tell you if you have completed all the sections correctly. If you have, you will have all green ticks and be able to click **Submit**.

Appendix A – Getting started top tips: User Accounts and Applicant Profiles

Getting started on Grantium

If you are not already set up on Grantium, you will need to create **a personal User Account** and / or **an organisation Applicant Profile**. This appendix will give you a few top tips to help you get started. Our guidance document Accreditation - Getting Started on Grantium includes more detailed instructions on getting set up on Grantium.

Once you're all set up, you can find more information about how to complete your form in Grantium in this information sheet and the online guidance Completing your application on Grantium.

Remember your organisation may already have a Grantium applicant profile set up. **We recommend that you check this before you get started with a new profile**.

Creating a personal User Account

To submit your Return on Grantium you will need a personal **User Account.** This is unique to each individual user and log on details should not be shared with anyone. The personal User Account will need to be linked to your organisation applicant profile.

If you do not already have a User Account, you will need to create one.

To create a User Account, go to the Grantium home page and click on **Create Profile**. More information can be found in the online guidance Accreditation - Getting Started on Grantium.

Please note that any notifications from Grantium will be sent to the email address linked to your User Account.

Your organisation's Applicant Profile

On Grantium an **Applicant Profile** represents your museum or art gallery. The profile number is eight digits long starting with a 5XXXXXXX.

- **If your organisation <u>does not have</u> an Applicant Profile,** then you will create one as part of the Accreditation return registration process. Your User Account will then be linked to your organisation's Applicant profile.

- **If your organisation <u>already has</u> an Applicant Profile** that you don't have access to, please contact the profile administrator to request your User Account be linked to the existing profile. Please do not create a duplicate applicant profile for your organisation.

- **If you are part of a National Museum Authority, Museum Service or Local Authority** we recommend you set up an Applicant Profile for each individual musuem site.

More information can be found in the online guidance [Accreditation - Getting Started on Grantium.](#)

Please note that any User Accounts linked to your Applicant Profile will receive Grantium notifications about your Accreditation Return.

Starting a new Accreditation return application - overview

This section provides an overview of the main steps to follow to get started with your Return application form. For more detailed systems guidance on setting up an Applicant Profile and application, see [Accreditation - Getting Started on Grantium](#)

To begin an application form:

Log into your [Grantium](#) User Account. Click on **Browse Programmes** in the left-hand menu. Find the Accreditation Scheme in the list and click on the **View** icon. On the next page, read the text and then click **Apply Now**.

When you get to the **Applicant Details** page, what you do next will depend on if your organisation already has an applicant profile or not.

If your organisation has an existing Applicant Profile (and your User Account is linked to it)

- Select the relevant Applicant from the **dropdown at the top of the page** and click Save & Next.
- You will see a screen which gives you the option review your applicant profile. You can do this now or come back to it later (For instructions on how to edit your profile, please see Appendix 1 of the [Completing your application on Grantium](#) guidance). Click **Next**.
- You'll be asked to input a Project Name (e.g. The X Museum, AN123, Return 2023). Giving it a clear name will help you to find it later. Click **Save & Next**.
- You will see the introductory page of the application form. On the left-hand side of the **Introduction** screen you will see your project number beginning **ACCR-.** This is the unique reference for your application in Grantium and you should make a note of it.
- You can then follow the instructions in this document, starting at [Navigating the application](#)

If your organisation does not currently have an Applicant Profile

- Go to the **create a new applicant section** on the bottom half of the screen.
- Fill in all mandatory sections of the applicant profile and click **Next** to proceed, then add your Applicant Project Name (e.g. organisation name, accredited number, year of application).
- Press Save & Next and you will see the introductory page of the application form. On the left-hand side of the **Introduction** screen you will see your project number beginning **ACCR-.** This is the unique reference for your application in Grantium and you should make a note of it.
- It will take up 10 working days for your organisation applicant profile to be validated. When you receive an email confirming that the applicant profile has been validated, you can log on to Grantium and continue working on your

application form – you will find it in the Submissions area. You can then follow the instructions in this document, starting at

> **Important** – **Make a note of your application form Project Number beginning ACCR-** This will help you locate your application form to continue working on it. If you need to contact us with a query about your application, please reference your Project Number.

I've already started an Accreditation return on Grantium – do I need to start again?

If you started your Accreditation return in 2019 / 2020 prior to the pause of the scheme due to Covid, you can continue to work on this existing application. However please note that some of the information you entered will now be out of date. Before you submit the revised application **please carefully review your application to ensure that all information, dates, and the supporting evidence attached are up to date and reflect the current position of the museum.**

To find your current application form log on to Grantium, click on **Submissions** in the left-hand menu. Go to the Applicant dropdown at the top left of the screen and select your organisation Applicant Name. Make sure all filters are cleared. You should now see your Accreditation application beginning ACCR-. To open the form, click on the orange folder icon on the right-hand side of the application row.

Having trouble with Grantium or your applicant profile?

If you have any queries about logging on to Grantium, or need your password resetting, please contact our Customer Services Team via telephone on 0161 934 4317 (10am-4pm), email at enquiries@artscouncil.org.uk or through a live chat service via our website https://www.artscouncil.org.uk/about-us/contact-us

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