IS VĚDA
TVŮRČÍ ČINNOST,
PROJEKTY A MOBILITY
Univerzita Karlova

RETURNS Manual for applicants

Obsah

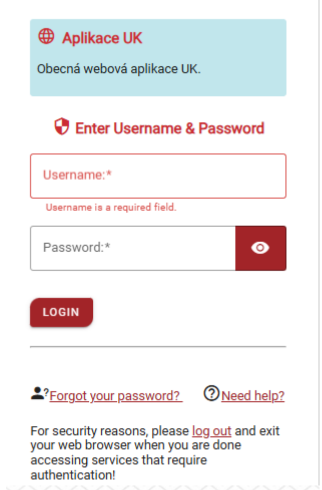
Project name: Návraty na UK
Project registration number: CZ.02.01.01/00/24_037/0013839
Methodology: https://opp.cuni.cz/OPP-148.html
More information: https://opp.cuni.cz/OPP-145.html

Co-funded by the European Union

MINISTRY OF EDUCATION, YOUTH AND SPORTS

Login and access to the PAS (Projects and Competitions) module

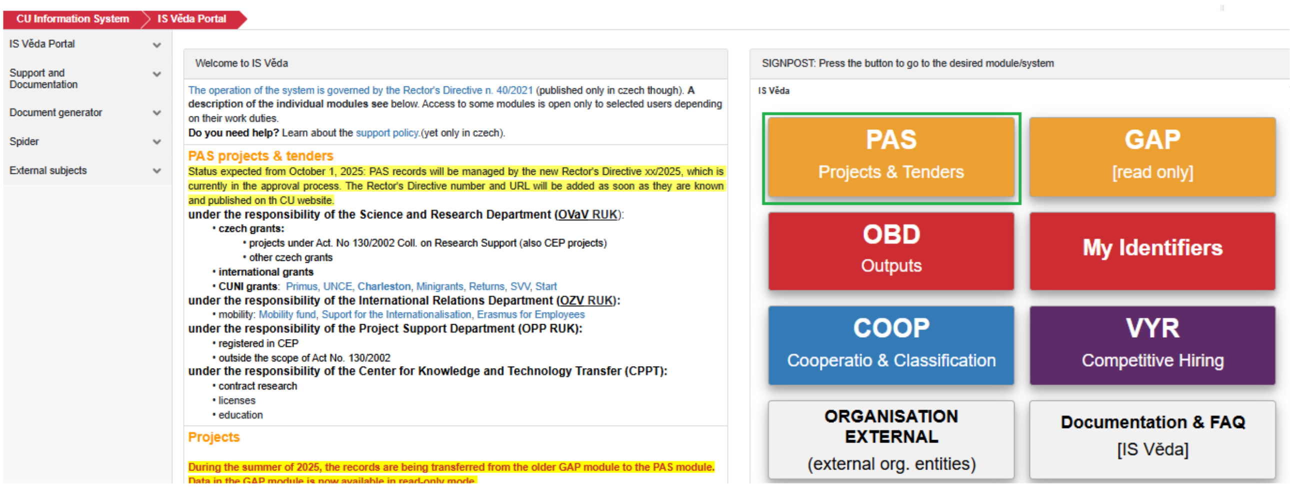
Applications are submitted via the **PAS (Projects and Competitions) module** of the IS Věda information system**.** The IS Věda information system is available at https://is.cuni.cz/veda, and can be accessed via a normal web browser. The system can only be accessed by students and employees of Charles University, who can log in to the system using data from the Central Authentication Service (CAS).



Username
Enter your personal number (CU personal number or assigned login).

Password
Enter the password.

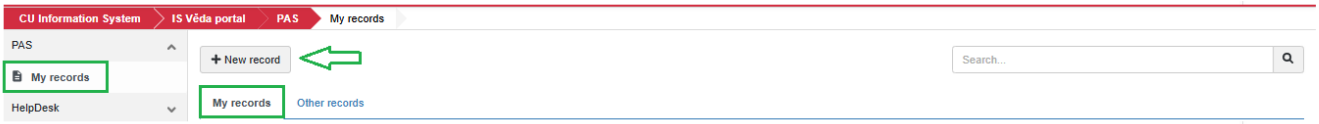
After logging in, the main page of the IS Věda Portal appears. Current information can be displayed in the left-hand part of the portal, and in the right-hand part there is a signpost in which you can click on the **orange PAS (Projects and Tenders) button.**



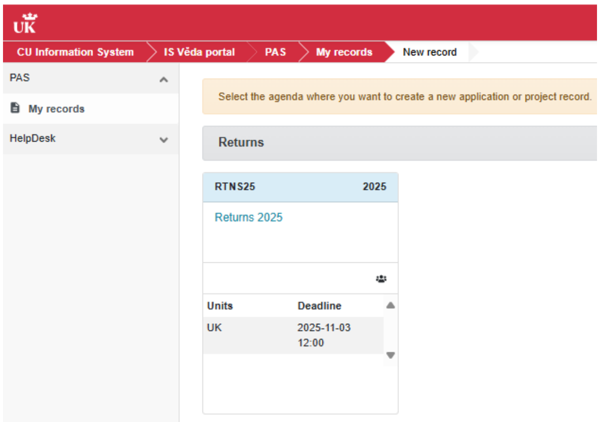
Creation, completion and submission of an application

Creation of an application

After entering the PAS module, you will see the Dashboard. On the left side of the screen, there is a menu where you can select the **My Records** menu.



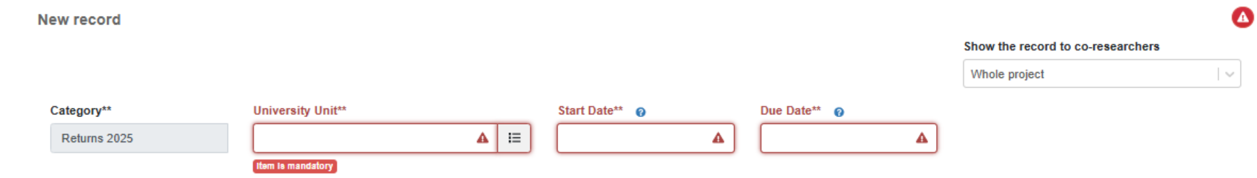
Click the **New Record** button to create a new application. A list of current open calls is displayed. **Click on the title of the call to select returns**.



After the category is selected a landing page appears, on which you can find basic instructions for submitting your application. We recommend that you read these carefully. You can return to them later by clicking the **Tender terms** button at the top right of the open application.

After reading the instructions, click on **the blue arrow button at the bottom right**.

The system creates the application after you have filled in the following basic data:



Some fields contain an information point that is displayed after clicking on the question mark in the blue circle.

If the required field is not filled in, it is marked with a warning icon in the form of an exclamation mark in a red triangle.

Show the record to co-researchers

It is not possible to change the value in this field. This option means that all other people who will be included in the application (see Contact Persons tab below) will have access to view the entire application.

Co-funded by the European Union

MINISTRY OF EDUCATION, YOUTH AND SPORTS

Start date, Due date
Choose the dates of the project from the calendar. The duration of the project must be stated in whole

months, i.e., beginning on the first day of the month and ending on the last day of the month. The project duration must be within the specified range, with a minimum duration of 2 years and a maximum duration of 3 years.

After filling in this data, click the **blue arrow-shaped button** at the bottom right. The system checks the completed data, and if they are complete, the application is created, and other parts of the form are opened.

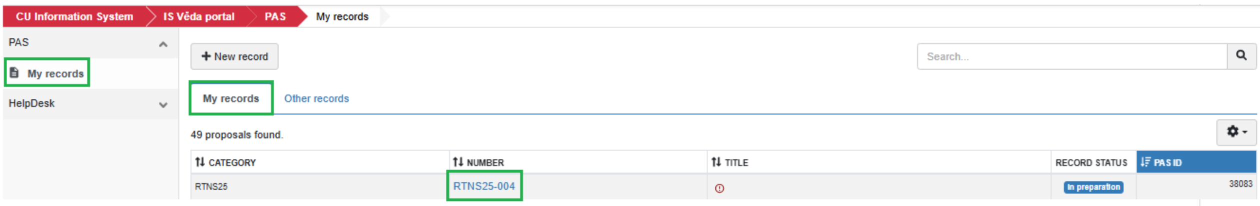
After the application has been created, it is necessary to enter the necessary data in all tabs except **Requests and Queries**. We recommend filling in the tabs in the order in which they are displayed. While filling in the application, it is possible and recommended to save the application as you go.

Completion of an application

The application form consists of several tabs. Each tab contains important information that must be filled in. Required fields are marked with asterisks **. At the top of the form, on the Basic Information tab, there is a header with the application identification details (application number, category, applicant, application status); these details are filled in automatically by the system and cannot be changed. When filling out the form, you can use the help function, which appears when you click on the icon .

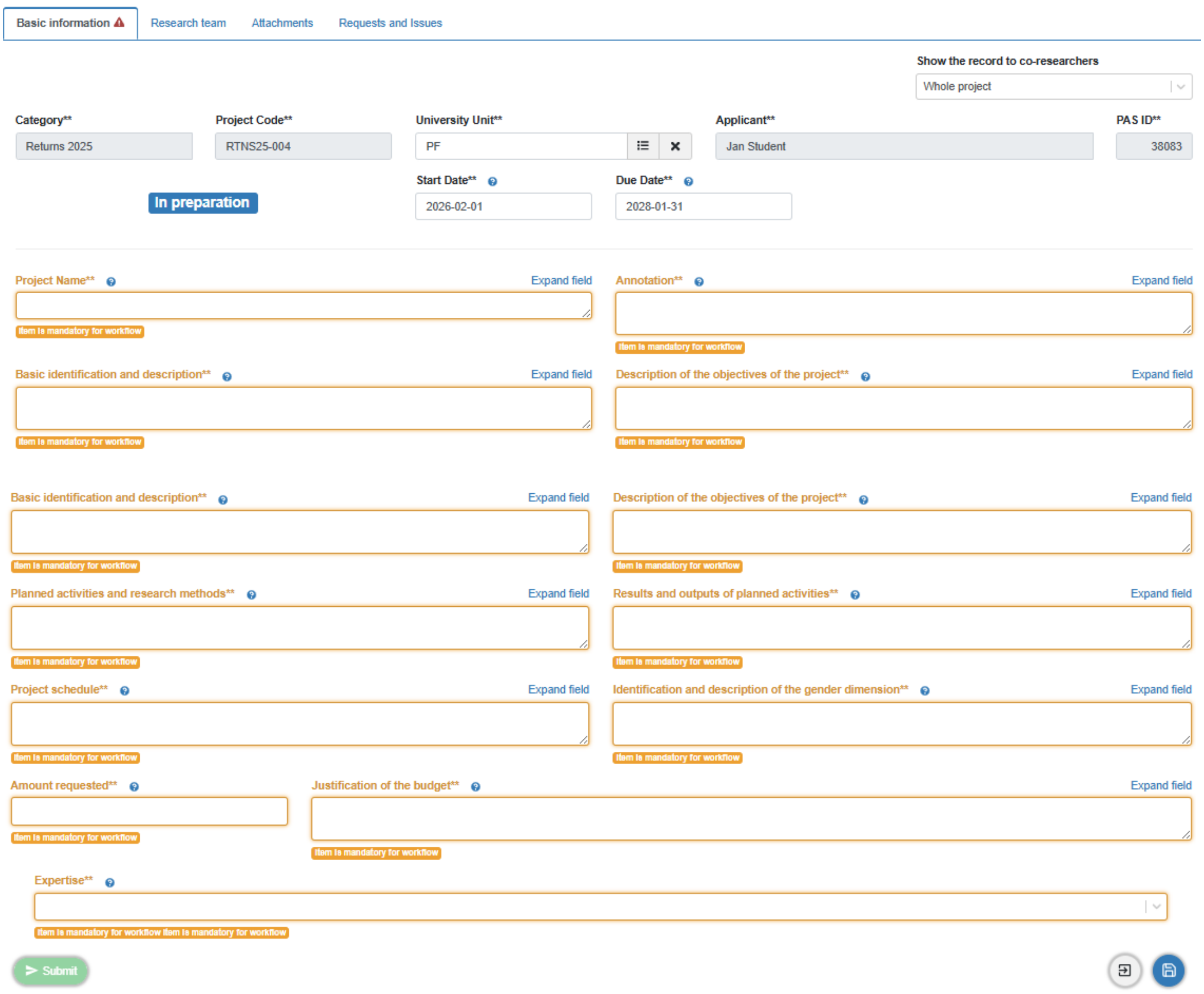
You can save your application at any time using the floppy disk icon button and then return to it later (each tab can be saved separately). Saving does not submit the application; submission is only possible after all required information has been filled in and the Submit button has been clicked. You can therefore edit your application as you wish until you decide to submit it.

You can access your pending application again via the My records menu. You will find it on the tab with the same name, My Records. Open it by clicking on the application number.



Basic information tab

On the first tab, you need to provide basic information about the project for which you are applying for financial support, including the requested financial contribution and its justification.



Research team tab

The tab is divided into sections: Principal Investigator, Supportive Professional Team, Internal Mentor, External Mentor.

The **Principal Investigator** is pre-filled according to the person submitting the application and cannot be changed. The Principal Investigator section is pre-filled with information from the personnel system; other details must be added.

The **Supportive professional team** is not mandatory. If other persons are to participate in the project, there can be a maximum of 4, and the total sum of their working capacity cannot exceed 2. Only persons affiliated with Charles University (internal persons) can be members of the supporting expert team, so they must be selected from the Charles University personnel database.

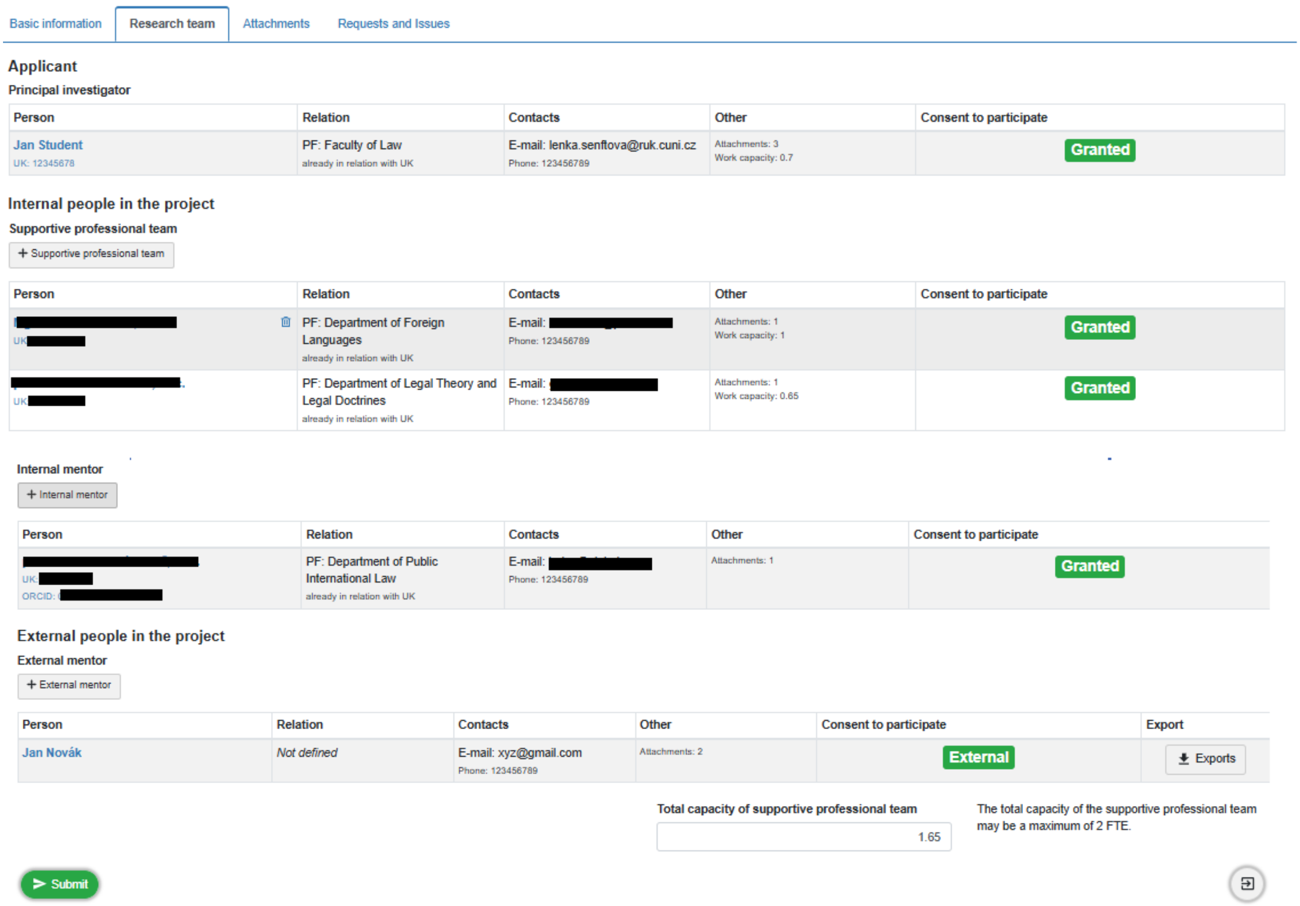
Every supportive professional team member listed in the application must give their consent to participate, i.e. confirm in the app that their data can be included in the application**. Until consent is given, it is not possible to edit any details of team member, including contact information.** The request for consent is sent to the person's e-mail address as specified in the HR system. Any missing contact information can be added after they have given their consent to participate.

A mentor is mandatory and only one must be listed on the application. If the mentor is a person affiliated with Charles University, they must be listed in the **Internal Mentor** section and selected from the Charles University personnel database.

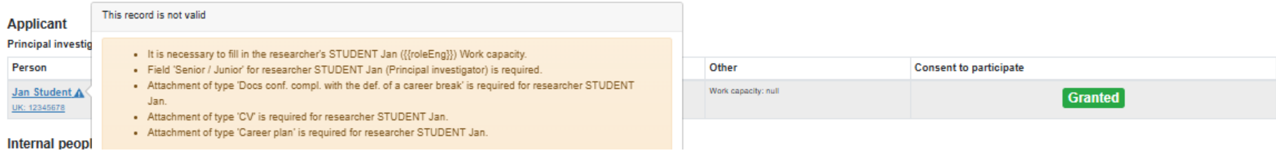
Internal mentor listed in the application must give his/her consent to participate, i.e. confirm in the app that their data can be included in the application**. Until consent is given, it is not possible to edit any details of internal mentor, including contact information.** The request for consent is sent to the person's e-mail address as specified in the HR system. Any missing contact information can be added after they have given their consent to participate.

If the mentor is from another institution, their details must be entered in the **External Mentor** section. In this case, basic information about the mentor must be entered and, after saving the application, a pre-filled form for the mentor's consent to participate in the project must be downloaded from the External Mentor table in the Export column. The form signed by the mentor must then be uploaded as an attachment of the type Consent to Participation. After entering mentor's consent to participate, you can enter additional information about the external mentor – contact details, external organization, other information. If you want to enter an external organization and cannot find it in the list of organizations, please contact support through the HelpDesk.

Detailed instructions for granting consent to participate in the project for internal and external persons are provided in the chapter General rules for inclusion of persons other than oneself.



If an icon with an exclamation mark in a blue triangle is displayed next to any person, it means that not all required fields have been filled in. Hovering the mouse over the triangle will reveal which information is missing.



You can fill in information about any person in a modal window that opens when you click on the person's name in the table of persons in the given section. Fill in all the required fields in the open window. Additional information is provided in the help sections for each field.

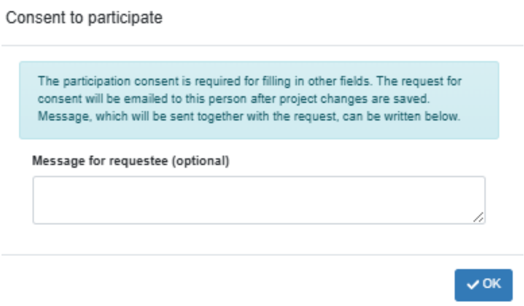
General rules for the inclusion of persons other than oneself (GDPR)

In order to ensure that they are aware of the use of their personal data (GDPR) as part of the application, all persons listed in the form must give their consent to such inclusion. If you list yourself as the applicant, the system understands this as a statement of consent; however, consent must be obtained from other persons who are to be included in the application.

The system sends an automatic e-mail to request the consent of persons listed as the Supportive Professional Team member or Internal mentor.

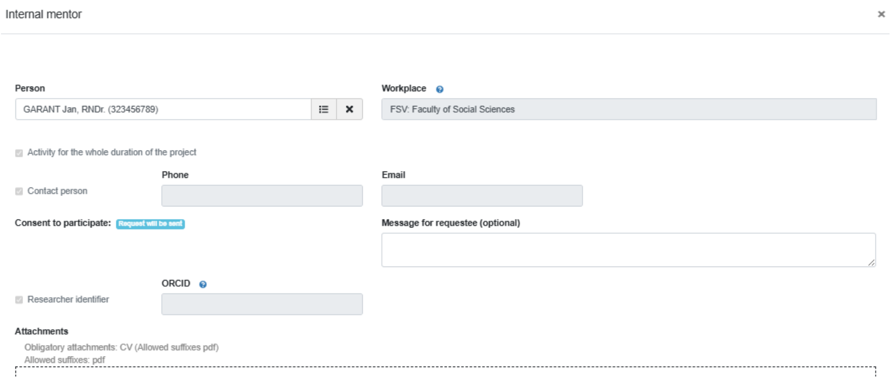
Detailed procedure for internal and registered persons

After selecting a person, a window will appear for you to write an optional personal message, which the system then includes in the automatic e-mail requesting consent to participate.

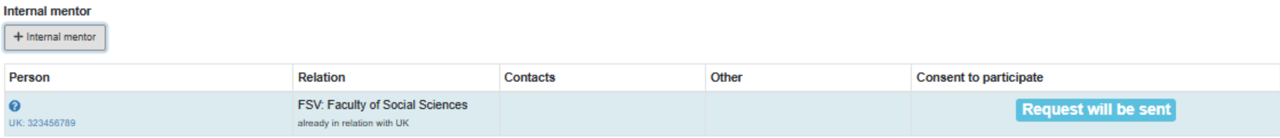


Confirming this window does not send the e-mail! E-mails are not sent in bulk to all entered persons until the changes have been saved (see below).

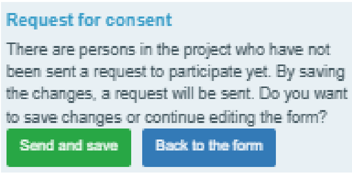
After this window has been confirmed it will not be possible to edit any additional fields in the detailed information for the person and no personal or study information will be loaded until the person has given their consent to participate. A label with the current status of the request ('Request will be sent') is displayed next to the name of the listed person.



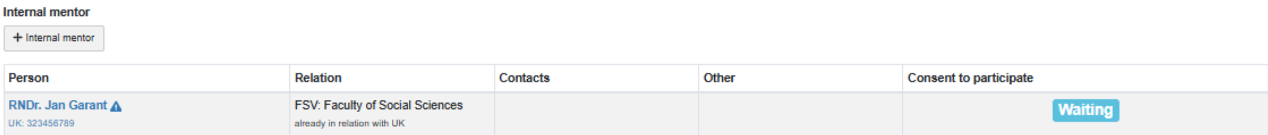
The application status label is also displayed on the research team's overview.



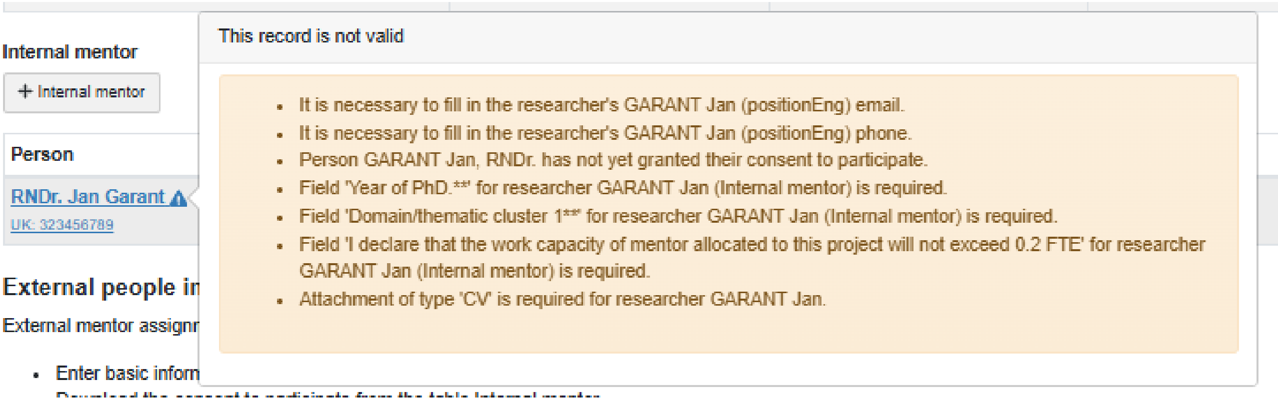
The system sends e-mails with a request only after the changes have been saved and it has been confirmed that they can be sent:



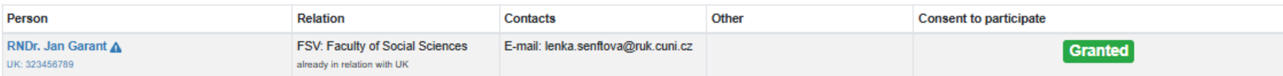
The person's status label will change to Pending Consent.

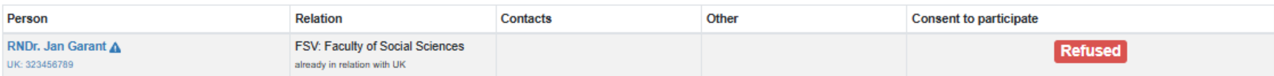


The applicant is notified of the need to wait for consent by an exclamation mark in a blue triangle:



You will receive an e-mail telling you whether the contacted person has granted or refused consent. The decision is indicated with a green or red label:



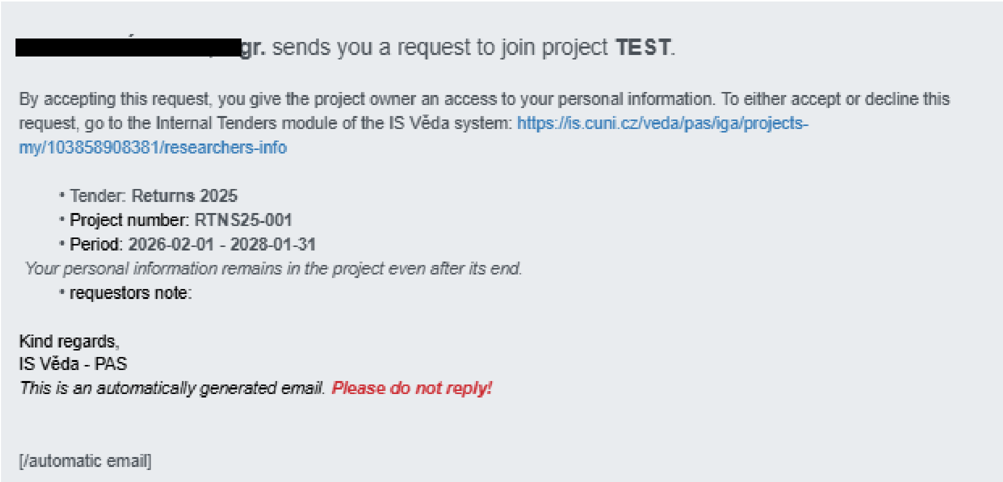


If consent is refused, the relevant team member must be removed (see Removing a person from the team).

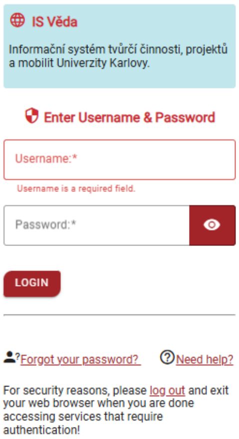
If consent is granted, the system will automatically unlock all locked fields and retrieve the remaining personal information from the code list, or data can be entered manually.

Consent procedure by internal or registered persons

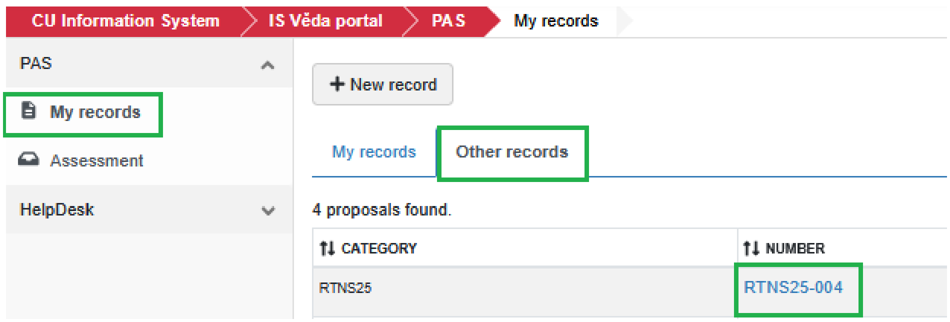
Persons designated as a supportive professional team member or internal mentor receive a notification e-mail with a request for consent.



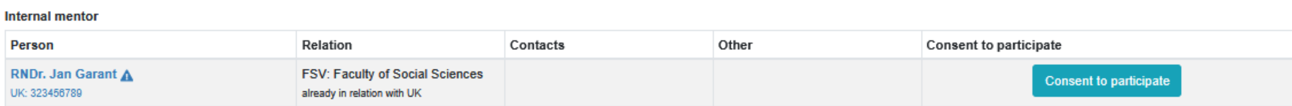
The IS Věda login page opens after they click on the link. If the internal person does not receive/cannot find the notification e-mail with the request for consent, they can enter the address directly into the browser: https://is.cuni.cz/veda.



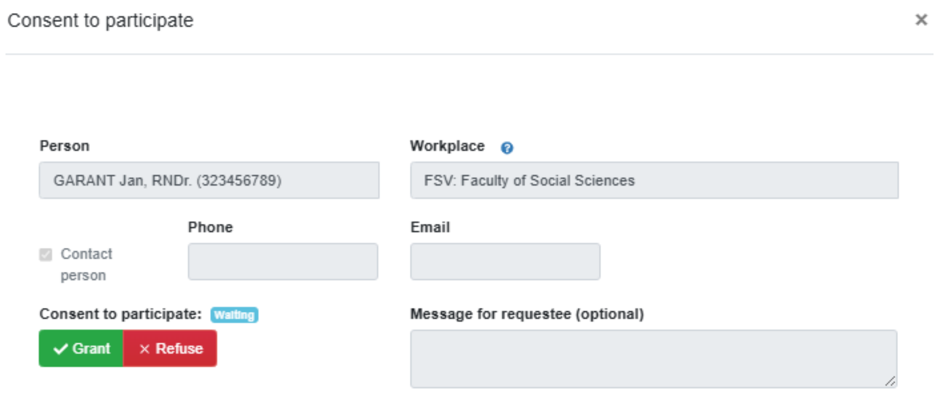
After logging in to the system, they must go to the PAS module. In the **Other Records** tab in the **My Records** menu on the left-hand side they will see the list of applications and must then click on the number of the application for which consent to participate is being requested.



They will find their name in the **Research team** tab, after which they must click on the 'Consent to Participation' button on the right.

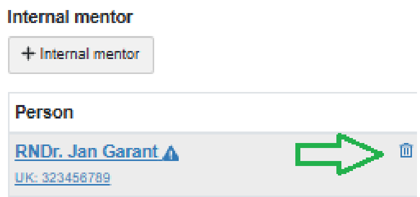


This button then opens a dialogue box through which they agree to participate by clicking on the green 'Grant' button or refuse to participate by clicking on the red 'Refuse' button.

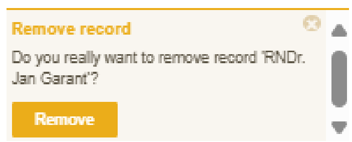


Removing a person from the team

If a person is entered by mistake, or if the supportive professional team member or internal mentor refuses to give their consent to participate, you can remove that person by using the button with the rubbish bin icon that appears when you hover your mouse over the field with the name of the position:



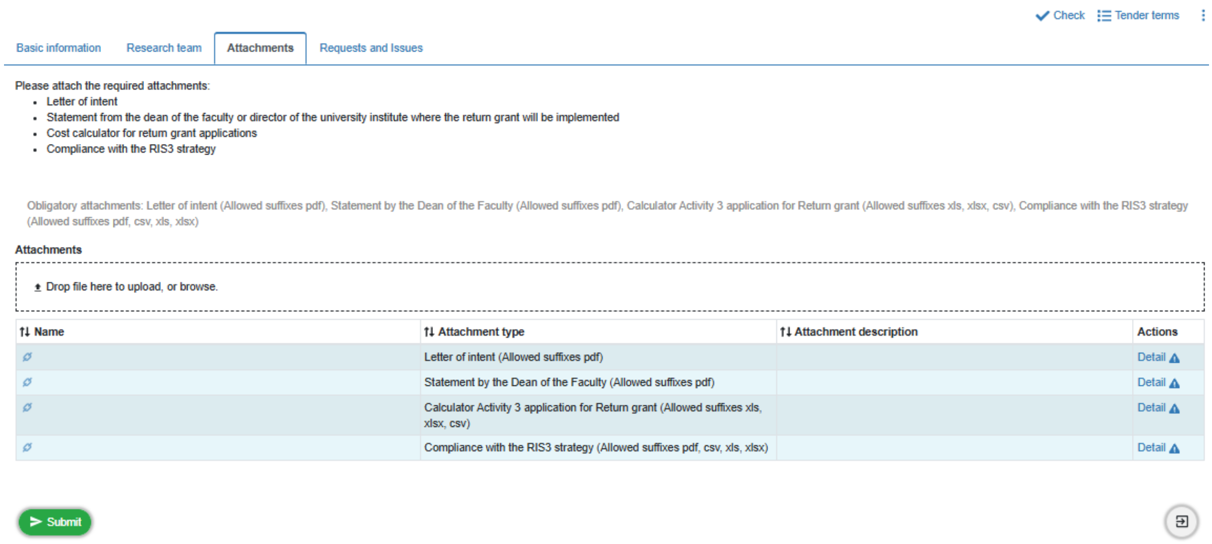
Removal of a person still requires confirmation:



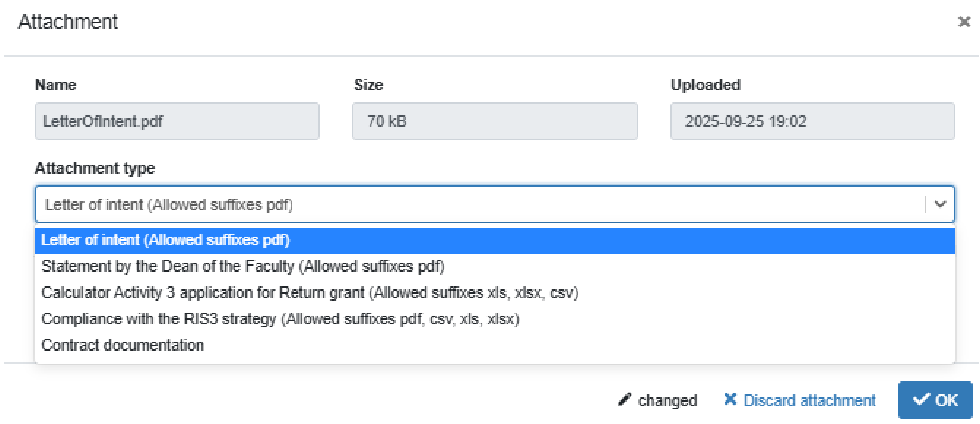
Attachments tab

You can attach files to your application on the tab. The list of required attachments is provided in the instructions directly on the tab. You can download the calculator and RIS3 strategy agreement in the competition rules. Applications cannot be submitted without the attachments marked as mandatory. Each attachment has specified file types that are permitted; attachments in other formats cannot be added.

To add an attachment, click in the marked space and attach the file from the hard disk or drag and drop the file into the space.



Subsequently, a dialogue box in which the correct **Attachment Type** must be entered is displayed.



You can insert additional text for the file in the **attachment description** field.

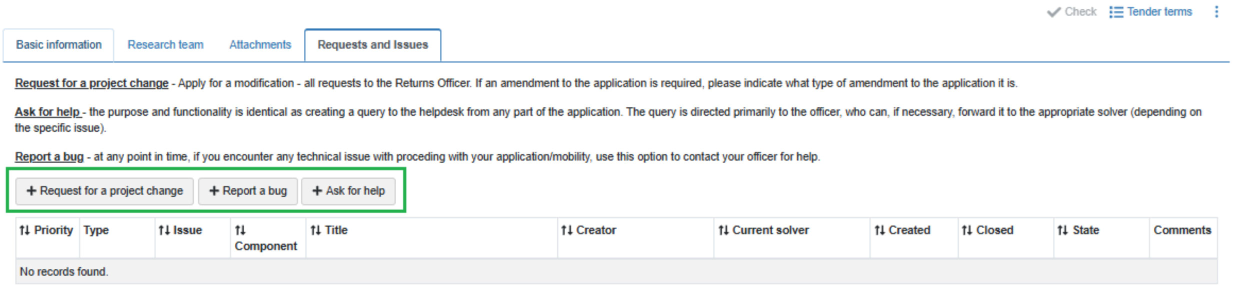
Attachments can also be added directly in the table by clicking the **Detail** button in the line with the attachment type:

Name	Attachment type	Attachment description	Actions
	Letter of intent (Allowed suffixes pdf)		Detail
	Statement by the Dean of the Faculty (Allowed suffixes pdf)		Detail
	Calculator Activity 3 application for Return grant (Allowed suffixes xls, xlsx, csv)		Detail
	Compliance with the RIS3 strategy (Allowed suffixes pdf, csv, xls, xlsx)		Detail

Requests and Issues Tab

This tab is used for all communication with the university clerk in charge of the Returns programme. Communications are also archived on this tab. If you need to request an edit to an application that you no longer have edit rights to with respect to its status, or add some information, please use the **Request for a project change** button. Likewise, you can add any attachment you want to your application or document requested by the clerk or request a permissible change to an ongoing project (change of supportive professional team member, change mentor or change due date of project). It is also possible to insert a helpdesk query (**Ask for help** button) in this tab. If you encounter any technical problems when working with your proposal or application, use the **Report a bug** button to contact the clerk for assistance. The clerk may, if necessary, forward the request to another member of the research team.

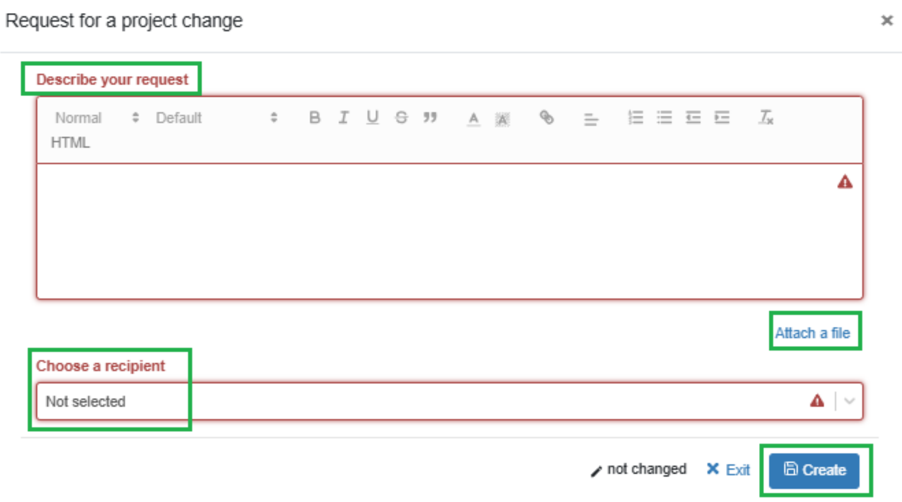
Requests entered in this way provide a direct link to the specific application from which it was generated and facilitate the identification of any problem.



Request for a project change

An applicant whose Return has been approved for financial support may submit a request for change. In the request submitted via the Requests and Issues tab, it is necessary to specify what change is involved (e.g., a change in the research team). All requests for changes must be recorded in the IS Science application. The request is reviewed by a clerk, and the applicant is informed of the outcome directly in their submitted change request.

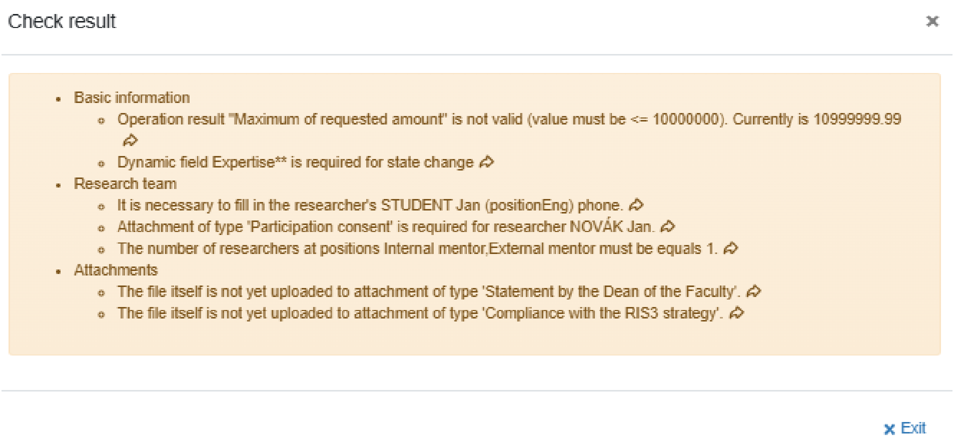
The entry form is identical to the one used when submitting a query to the helpdesk from any part of the application. The only difference is whether it is a general query or a specific request to change the information in the application.



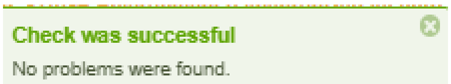
Systematic review of the application

The **Check** button can be used to verify the status of the mandatory items while filling in the application; however, before doing this the form has to be **saved**.

After the button has been pressed, the system checks that all mandatory items have been completed. It highlights any missing data that has to be added. Example:



The system also checks whether all persons have given their consent to participate. If all details have been filled in, the check is successful, and the application can be submitted.



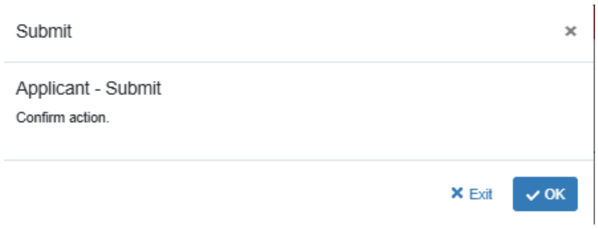
Print/Export application

The **print button** (downward-pointing arrow icon is located at the top right, next to the Check and Tender terms buttons.

Submission of application

Only applications that have successfully passed the system check (see above) can be submitted. Use the Submit button (in the lower left corner of the screen) to submit your application.

After pressing the **Confirm** button, you will **no longer be able to edit the application**. At the moment of submission, the record passes to the responsibility of the clerk, who further processes the application.



If the application period has not yet ended, it is possible to withdraw the application, edit it, and resubmit it.

If the collection has already ended, it is no longer possible to withdraw the application. In this case, you can contact the clerk by message only, i.e. insert a question or request using one of the buttons on the **Requests and Issues** tab, at any time during the processing of the request by the clerk.

Processing of submitted applications

After the application collection period ends, internal processing takes place. The application is checked to ensure that it has been submitted correctly and meets the eligibility criteria. If the application is rejected at this phase, it is moved to the status Excluded in the 1st round.

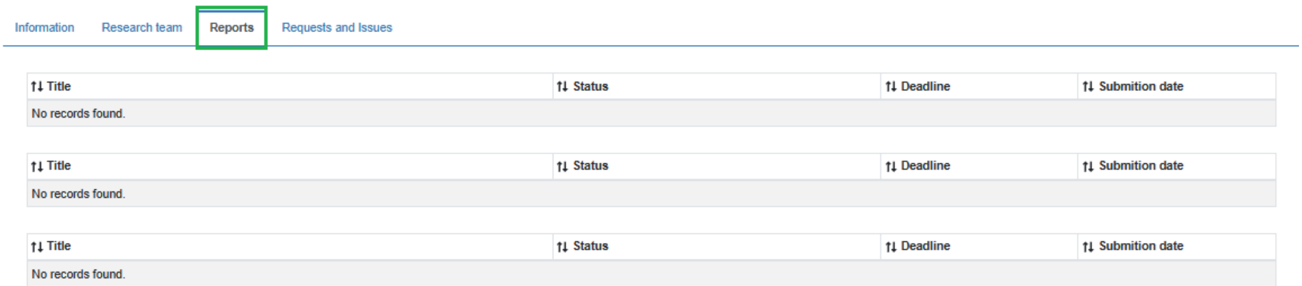
This is followed by a substantive evaluation process by evaluators, who assess the application and complete an evaluation protocol. The result of the substantive evaluation is a decision on whether the application will be Accepted or Rejected or possibly Rejected due to capacity reasons (Rejected – alternate). The application is then transferred to the appropriate status. In the statuses Rejected, Accepted, Rejected (alternate), Grant accepted by applicant, Grant not accepted by applicant, reports with the results of the substantive evaluation will be available.

Interim report, Final report

Every applicant whose project has received financial support is required to submit an interim report within 15 days after the end of each month of project implementation. In the interim report submitted after six months of the project, the applicant is required to attach a data management plan. The data management plan must be updated whenever there is a change during project realization.

Every applicant whose project has received financial support is required to submit a final report within 1 month after the end of project realization.

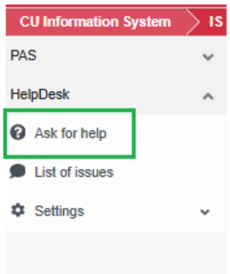
Documents must be uploaded in electronic form to the Return realisation record on the **Reports** tab in the IS Věda application.



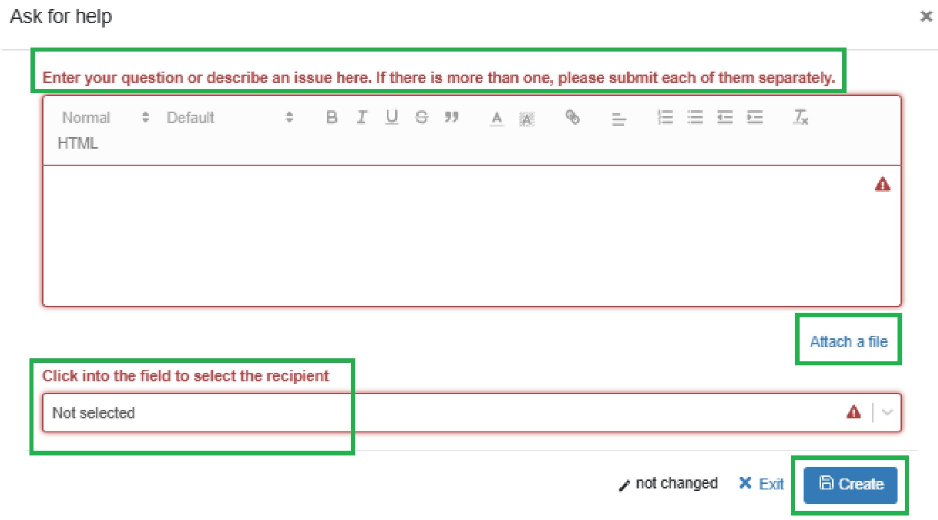
Support – HelpDesk

You can contact the system support of the PAS module using the built-in HelpDesk or directly in the app via the Requests and Queries tab.

Using the navigation on the left-hand side of the screen, click **Ask for help** to open a window for you to complete your query.



Now describe in detail what you need help with. Choose as one of the recipients the **Returns** and click on **Create** to send the query.



As soon as someone responds to your question, you will be sent a notification e-mail, which also contains a link leading directly to the detailed reply to your question. You can check the status of your query at any time in the **List of issues** section in the left-hand side of the screen. Here, you can search for all the queries you have ever entered or dealt with in the system.